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Written for those who are new to design and page layout, this book focuses on providing novice desktop publishers with an understanding of communication, graphic design, typography, page layout, and page layout techniques. The book also discusses how people read, design as a consequence of understanding, and the principles of page layout. Chapters in the book are: (1) Introduction; (2) Designing for Communication; (3) Principles of Design; (4) Understanding Type; (5) Using Type Effectively; (6) Principles of Page Layout; and (7) Page Layout Techniques. (RS)

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designing for communication

the key to successful desktop publishing

Ted D.E. McCain

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About the Author

Ted has been interested in graphics since childhood. He graduated from high school with a fine arts focus and was intending on going to the Vancouver School of Art when a scholarship to Simon Fraser University significantly altered his plans. He graduated from Simon Fraser with a specialty in Computer Cartography. After doing the initial work on a graduate degree in computerized terrain analysis, he spent several years working at various jobs in the computer industry, including programming, sales, and consulting. He began teaching in 1981 just as the microcomputer revolution was beginning to hit the school system. He has taught Computer Science, Mathematics, and Data Processing. He is currently the Coordinator of Instructional Technology at Maple Ridge Secondary. The desktop publishing revolution gave Ted the opportunity to marry his long standing love for graphics with his skills in business computing. Recently, he designed two desktop publishing courses for grade 11 and 12 students in the Maple Ridge School District. In addition to teaching, Ted runs his own computer consulting company and often gives presentations and workshops on design, desktop publishing, and the impact of technology on business and education.

Editors

Anita Best and Kim Ralston, ISTE; Heather McCain, Ian Jukes, Rick Withers, and John Cameron

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Ted D.E. McCain

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Designing for communication

The key to successful desktop publishing

Ted D. E. McCain

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Preface

Preface

Welcome Welcome fellow publisher! If you are reading this, you probably fit one of two profiles relative to your experience in desktop publishing. You may be a complete novice with very little experience with page design or with the electronic tools used to bring those designs to fruition. On the other hand, you may be a computer expert with a considerable level of operational expertise with electronic publishing tools, but in need of assistance in how to construct effective documents. In either case, be assured this book is for you.

Why I wrote this book There are many books on the market that are concerned with desktop publishing. Why write another? First, there is a widespread misconception that if you learn to use the hardware and software graphics and page layout tools of desktop publishing, you'll be a successful publisher. Unfortunately, this is not the case. In addition to these operational skills, successful desktop publishing also requires an understanding of communication, graphic design, typography, page layout, and page layout techniques to guide your use of desktop publishing tools. In this book I have focused on the second set of skills because a knowledge of these concepts is clearly the most pressing need in the new endeavor of desktop publishing. Furthermore, I wanted to address three topics that are not well covered in even the best desktop publishing books. These topics are: how people read, design as a consequence of understanding, and the principles of page layout.

Second, while there are many excellent books that cover each of these additional topics required for successful publishing, you can't find a single book that provides an adequate introduction to all of these topics for the novice designer/publisher. So, throwing caution to the wind, I have attempted to do just that: write a book for those who are new to design and page layout that provides an introduction to *all* of the necessary concepts for success. This book is not meant to be exhaustive in its treatment of any particular concept or technique. Instead, I hope to give you just enough information to get started on producing effective documents.

How to use this book Let's begin with some suggestions that will make your reading experience more enjoyable. So many desktop publishing books on the market today discuss page layout techniques that it is easy to make that your focus as you attempt to improve your documents. Don't! Make sure that you consider the principles outlined here. Principles empower you to make design decisions and learning these principles will bring you much return in the long run.

As with most fields of endeavor, publishing has a great many standard terms and techniques that are used to describe and solve various page items and design problems. It is very difficult to discuss page design without mentioning a few of these. For the novice, the use of publishing terms and techniques can be intimidating. To reduce the reader's frustration level, use of such terminology has been kept to a minimum.

However, you will undoubtedly encounter some unfamiliar terms as you make your way through this book. When this occurs, refer to the visual glossary of page layout terms on pages 134 and 135. You may find it useful to put a book mark there for easy reference. Furthermore, if you want more detail than contained in the brief explanation in the visual glossary, refer to chapter seven for a more complete description of the term or technique.

Relaxation is the key

Finally, it is most imperative that you relax. You will not become an accomplished publisher overnight: it takes a combination of knowledge and experience. Reading this book will help you gain some of the important knowledge required for the production of effective communications. However, the experience will take time and you cannot short circuit this process. So relax as you earn your stripes in the publishing trenches with the assurance that your own distinctive style will emerge quite naturally as you continue to produce documents.

10

Chapter one

■ Introduction

"We stand at the dawn of a new era."

John Naisbitt and Patricia Aburdene

Chapter one

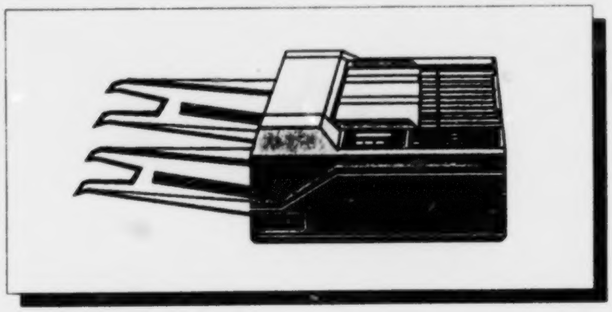
Introduction

The changing face of business

> *"Discovery. Application. Impact. Discovery. We see here a chain reaction of change, a long, sharply rising curve of acceleration in human social development. This accelerative thrust has now reached a level at which it can no longer, by any stretch of the imagination, be regarded as normal."*
>
> *Alvin Toffler*
> *Future Shock*

Have you noticed how quickly Fax machines have become standard equipment in most offices? It seems that just yesterday business was discovering couriers as an alternative for sending important documents. Now documents are faxed to their destination in seconds. And not only that, this blinding speed is available at an amazingly low cost. Fax machines are radically changing the way businesses negotiate contracts, submit estimates, place orders, and exchange product information

Fax equipment is just one indication of a great wave of technological change that is sweeping across the world. Alvin Toffler calls this technological revolution The Third Wave of large scale change in human history. It is a revolution that appears to be much more powerful and pervasive than either the Agricultural or Industrial Revolutions that have previously swept across human Society.



The rapid changes taking place as a result of the introduction of the fax machine are an indication of the vast changes that technology in general is bringing to our society.

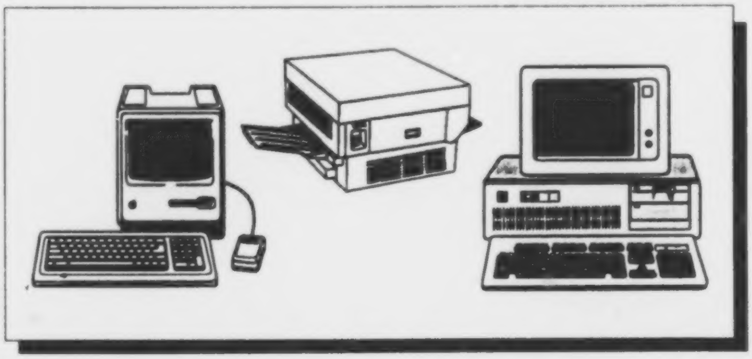
This revolution based on technology, however, is still in its infancy and its momentum is still building. This means that the startling changes we see happening around us today are only the beginning. Eventually, this wave of change will touch virtually every aspect of life. The power of the technology will greatly increase in the years to come and increase at an ever quickening pace. In fact, the capabilities of technology will become so sophisticated that we will be compelled to implement it in areas never before thought even remotely possible As a result, the business world will experience continual and even more radical changes as the technology matures

Just look at the change in the publishing industry

An indication of the kind of change that lies ahead can be found by looking at what desktop publishing has already done to the printing/publishing industry. To understand the magnitude of this change, consider first that modern publishing as we know it began in 1450 when Johann Gutenburg developed the first printing press with movable type. Written communication, of course, dates back to ancient civilizations. Over these many hundreds of years, much human effort has been exerted in discovering, developing, and refining the concepts and techniques of graphic communication. Advances in technology were an integral part of this process; but the technology was generally large, expensive, and required considerable training to be used effectively.

> *"...I have focused on Apple's Macintosh. This has been intentional because, without the Mac, I doubt if desktop publishing as we know it today would ever have happened."*
>
> *John Seybold*
> *Byte Magazine*
> *May 1987*

The development of the microcomputer and publishing software, however, has made enormous changes to graphic communication in just a few short years. The first commercially available microcomputers hit the market in the mid to late 1970's. These machines came with word processors that performed some limited publishing tasks. Desktop publishing really began in January 1984, when the Apple Computer Company introduced the Macintosh computer and its accompanying software, *MacWrite* and *MacPaint*. These two programs were the first to allow microcomputer users to easily set text in various typefaces at various sizes, to draw and incorporate graphical objects into word processing documents, and to see the changes on the screen before they were printed.



The Macintosh Plus and the LaserWriter were the two pivotal developments that initiated the field of desktop publishing. Soon after, publishing capabilities were added to other computer platforms, like MS-DOS computers.

This fledgling electronic publishing quickly matured when Apple introduced the LaserWriter printer in January 1985. Later that year the Aldus Corporation introduced *PageMaker*, a page layout program for the Macintosh, and desktop publishing graduated to a sophisticated level of graphic production. Since then developments in the hardware and software for desktop publishing have appeared at an astounding rate. Many new programs and refinements have been developed for several computer systems, the Macintosh and MS-DOS computer platforms being the most common. These new electronic tools have simplified many of the complex tasks in the publishing process to the point that people without extensive graphics training can produce sophisticated documents without ever having to contact a professional layout artist or printer. Furthermore, those documents can be produced with microcomputer equipment that is quite inexpensive.

Changes brought on by desktop publishing systems have already turned the printing/publishing industry upside down. In an even broader context, the ability to publish from the desktop is changing the way that businesses perform their daily tasks. Desktop publishing skills are fast becoming a necessity in jobs where no such requirement existed a year or two ago, and, as the wave of change brought on by this powerful new technology picks up speed, business is certain to experience even more substantial changes in publishing and, indeed, in every aspect of business life.

The shift to an information driven economy

One of the most significant trends in modern society today is the dramatic rise in the importance of information. Improvements in so many fields are being developed at such a great rate that there is already a veritable avalanche of information regarding new products. Today, it is almost a full-time job to just keep up with the new data being published in any particular field. And it will become increasingly more difficult to keep up in the future because technology is fueling an enormous engine of change, which is accelerating the rate at which new and more powerful developments are completed. For many companies, knowledge of these new products will be the key to holding a competitive edge in the market place.

> *"Information is power, a world currency upon which fortunes are made and lost. And we are in a frenzy to acquire it, firm in the belief that more information means more power."*
>
> *Richard Saul Wurman*
> *Information Anxiety*

The impact of this information explosion is intensified by the startling advances taking place in communication technology. Messages are already being sent world wide at an astounding speed. Future advances in communication technology will allow you to transmit publications complete with text, graphics, and even video around the globe instantaneously using technology that is truly affordable. The result will be overwhelming. People will experience such a deluge of data that most information, valuable as it might be, will go unnoticed.

The ability to make the significance of a message readily accessible to the reader will be a tremendously marketable skill in a world that thrives on information. In such an environment, those who can communicate messages effectively will have great power.

Technology is making world-wide communication more and more immediate. The resulting avalanche of information flooding our lives is overwhelming. Effective communication skills are a valuable asset in such an environment.

Desktop publishing has been hailed as a great advance in the production of effective communications. It follows that desktop publishing skills will be an essential requirement for competing in an information-based economy. Let's critically examine this new field of desktop publishing to see if it really is as powerful as it has been made out to be.

Two opposing views of desktop publishing

Power to the people

One view of desktop publishing focuses on the capabilities of this new technology and the ease of access to this publishing power. To see desktop publishing from this perspective you must first consider the traditional publishing process. Traditional publishing is done by specialists, people with skills in page layout, type setting, drawing, film stripping, half toning, color separation, paste up, plate making, and printing. Using their skill to do your work involves working with a company that specializes in commercial graphics. The process is less than efficient, at times slow and cumbersome. Delays are caused by the amount of work the graphics company has to do, the production and editing of proofs, and the waiting for the actual production of your final documents.

The equipment used is large and expensive, so the overhead for such businesses tends to be quite high. This is, of course, passed on to the customer. The design, editing, and production of documents requires the time of skilled specialists, which also adds to the cost. In addition, most of the work is produced directly on paper. This hard copy of the document is not easily changed. Edits to the publication require more work for the specialists generating new hard copies. The process can be long, inefficient, and expensive.

Traditional publishing involves highly trained specialists working directly on paper.

Now consider the power and efficiency of desktop publishing. First, desktop work stations give immediate results. The screens increasingly are providing WYSIWYG (What You See Is What You Get) feedback for page design. Once a document is completed, printing can be done immediately on medium-quality laser printers or high quality Linotronic printers. Furthermore, with the growth in the power of telecommunications, the completed document can instead be immediately sent to its destination electronically without ever being printed.

> *"...the publishing process has suddenly become democratized and affordable beyond the dreams of only a few years ago."*
>
> *John Seybold*
> *Byte Magazine*
> *May 1987*

Second, desktop publishing software provides the publisher with unparalleled flexibility. The screen representation of the document is called the soft copy because it can be changed easily. If a graphical object must be resized or edited, or if some text must be edited, moved, resized, or set in a different type face, these edits can be done right on the screen. Proof reading and design editing is possible before a single page of the document has been printed.

Third, desktop publishing systems are quite easy to use, especially when similar tasks are compared to traditional methods. The capabilities of the software simplify many publishing tasks. The power of the desktop systems takes much of the tedium out of the process. Some tasks are performed automatically. Now, even people without formal training can become publishers using this new technology.

Fourth, these powerful new desktop systems are very inexpensive when compared to the cost of traditional publishing equipment. A single desktop hardware/software system can cost as little as $2000 to $5000. This means that more businesses than ever before can now afford the equipment to keep the design work for their publications in-house. By adding a laser printer ($2000 to $8000), businesses can keep the entire publishing process in-house for most of the publications that used to be sent out to professionals. This dramatic decrease in cost means that more people than ever before are becoming involved with the publishing process.

"Overall, I believe the computer age favors the individual and that resistance to the individual work style is the last gasp of the dying industrial age."

Paul Lutus
Digital Deli

Fifth, desktop publishing systems allow individuals far more flexibility in how and when they do their work. Many of the new desktop systems are portable, so creative design and production work is not tied to any particular location or time of day. This flexibility is greatly increased by the ability to send documents electronically over the phone lines. As is the case with many of the new technologies, desktop publishing favors the individual and his or her own individual work style.

Consider the power and freedom that is represented in this picture. Portable microcomputer technology is spawning sweeping changes in the nature of work.

When you look at desktop publishing from this perspective, its use is compelling. Combine all of this efficiency and flexibility with the ongoing rapid growth of power in new and enhanced desktop publishing systems, and you have a true revolution in commercial graphic arts that will emancipate the stifled creativity of the masses. Power to the people!

A disaster for design

However, there is another, quite different view of desktop publishing that focuses on the quality and usefulness of the product created by these new desktop publishers. Just how attractive and effective is the output being churned out of these powerful desktop systems? With all this new-found efficiency and flexibility, the answer is quite disappointing. In far too many cases, the product simply does not effectively do what it was intended to do.

An examination of the publishing process reveals that there are two sets of skills required to produce attractive and effective publications. The publisher must have operational skills for the equipment to be used. But these skills alone are not enough. The publisher must also have communication and design skills to use the technology effectively.

It is operational skills that are changing so radically with the development of desktop publishing. New hardware/software configurations are making complex traditional procedures astonishingly straightforward, even automatic at a truly remark-able rate. Taking advantage of these new systems requires a commitment to the continual upgrading of operational skills. But the basic concepts of communication and design have not changed radically in the era of desktop publishing. The strategies and techniques developed over the last five hundred years for creating pleasing documents that deliver a message effectively are still valid today.

"Desktop publishing provides broad new horizons for possible bad taste."

Paolo Bertoia
Desktop Publishing Consultant

The concepts of communication and design are still useful because people are still people. They react to visual stimuli in basically the same way that people have for centuries. There is no doubt that people today are bombarded with new forms of stimuli, but the foundation of design remains unshaken. In fact, the modern stimuli-rich environment actually accentuates the need for good design to get and keep the attention of your audience. You cut yourself off from the valuable developments in design of the past at the peril of pumping out hopelessly ineffective publications.

Today people react to visual stimulation pretty much as they always have. Reading hasn't changed as much as the method for producing reading material.

Desktop publishing must be seen as providing new tools for an old endeavor. These new tools have great power, but that power must be guided by an understanding of design. Without design and page layout skills to guide their use, the new tools of desktop publishing are very much like a ship without a rudder to give it direction.

The envelope please...

Power to the people or a disaster for design? The truth is that both of these views of desktop publishing are valid. The new electronic tools are incredibly powerful, and they are redefining the field of publishing. But the need for an understanding of design to guide their use has never been greater, particularly with so many people with no formal graphics training becoming involved in the publishing process. Developing your design skills is critical for the successful implementation of desktop publishing systems.

There are many books and manuals that teach you how to operate the hardware and software of this new publishing technology. What is lacking are the materials that develop a comprehensive understanding and analysis of designing for communication. This book will introduce you to desktop publishing from that perspective.

Frequently, books about desktop publishing focus on the capabilities of hardware and software tools. Unfortunately, this does not lead to effective communication. In this book, we will focus on people and what is needed to get messages across to readers.

Chapter two

Designing for communication

> "As we enter the twenty-first century, information will become an increasingly important commodity. Those who will be able to communicate messages effectively will have great power."
>
> Ted McCain

Chapter two

Designing for communication

Foundations of publishing

The importance of communication

Do you know anyone who sorts their mail over the waste paper basket? The mail that goes directly into the basket represents a lost opportunity for a company to cultivate demand for its product or service. It is *critical* that written material be designed to generate immediate interest to avoid the direct path into the garbage. Once material has created enough interest to avoid the direct path into the waste paper basket, the goal is to communicate a message about the company and/or its products. If the document can get this message across to the reader, the potential for doing business greatly increases. In business, the bottom line is that effective communication means profit.

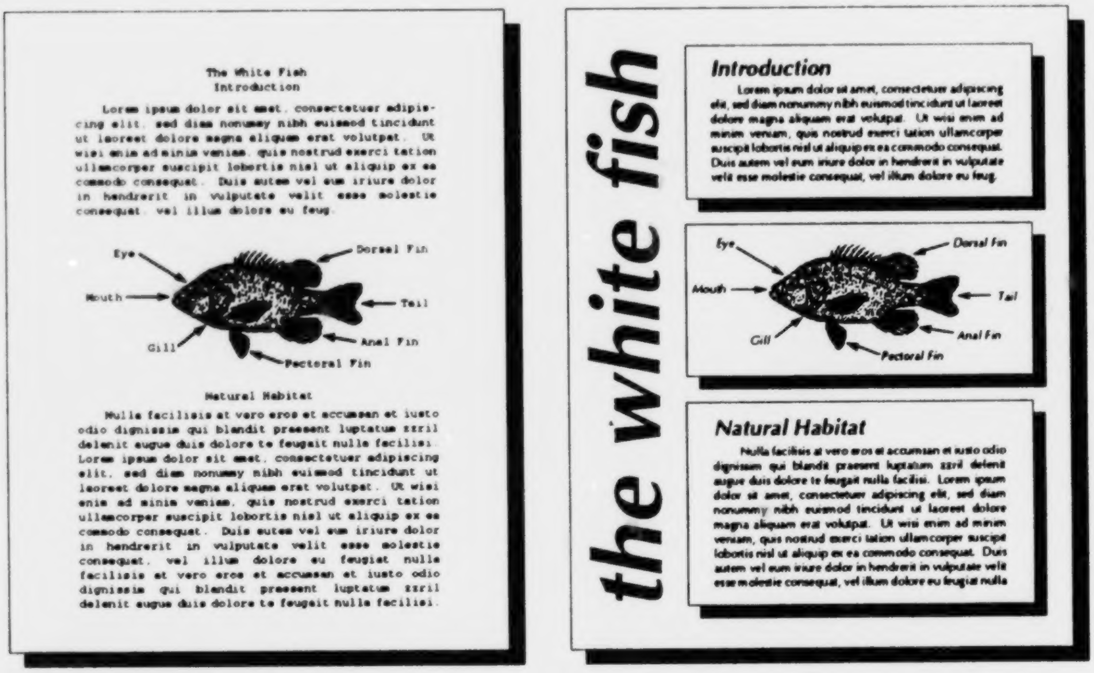
Communication is also critical in education and training. At all levels, unread instructional material represents a lost opportunity for the acquisition of knowledge and skill. There are many activities that vie for the students' attention. If instructional material is designed to generate and maintain sufficient visual interest to make reading more appealing, the potential for the personal growth of the student is greatly enhanced. In education, effective communication means learning.

Get your priorities straight

Messages to readers — this sums up the entire endeavor of publishing, whether you use traditional or modern electronic desktop techniques. Everything you do on a page must support the communication of a message. You must remember that the content of the message must take priority over the techniques used to convey that message. In other words, the form of a document must follow the function of a document. As a desktop publisher, you have at your disposal powerful tools for manipulating graphics and text that will allow you to produce spectacular effects effortlessly. It is, however, all too easy to become so enthralled with the power of these tools that your message gets lost in the dazzling array of effects on a page. For example, if the members of your audience are drawn to the dazzling graphics on a poster and remark on the beauty of your work, but then move on before reading the content, all your spectacular work is a gloriously aesthetic failure. *Above all else, anything you publish must communicate a message.*

Appearance is a critical part of the communication process

What keeps mail from going directly into the waste paper basket? What makes you want to read magazines and newspapers instead of novels and text books? To a large degree, the answer is the appearance of the page.



The White Fish
Introduction

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the white fish

Introduction

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Natural Habitat

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Which page would you rather read? The appearance of the page on the right is creating visual interest and providing visual organization to enhance communication.

Appearance is a frequently overlooked factor in the communication process. This is often a result of focusing too much on the content of a document. People who write are naturally concerned with the message they want to communicate. In the past this focus on content was not a problem because writers gave the text of a document to graphic designers for publishing. The designers would apply their knowledge of graphic design to create a layout that best presented the document's message.

Today, however, desktop publishing technology allows writers to take a document right through to a completed publication. Often writers have little or no training or experience in understanding the role of design in enhancing communication. In addition, so much effort goes into the writing of the content, the design of the page is often an afterthought, done hurriedly after the "real work" of writing is finished. But appearance is far too important to be treated in this way. Just look at the two designs on the previous page and you'll see how appearance enhances the communication of a message.

Appearance is not simply a matter of visual stimulation. Appearance also serves a very functional role in the conveying of a message. Appearance can convey visual organization, a structure that gives significance to information. To further understand the role of appearance in communication, you must consider the three distinct steps that readers take when they encounter a new document.

Three critical steps in reading

Volumes have been written about how communication takes place. For the purposes of desktop publishing we will not concern ourselves with the more esoteric, theoretical concepts of the communication process. Instead, we will identify three very practical steps that a published document must facilitate if it is to successfully deliver a message to the reader.

- Scan
- Skim
- Scour

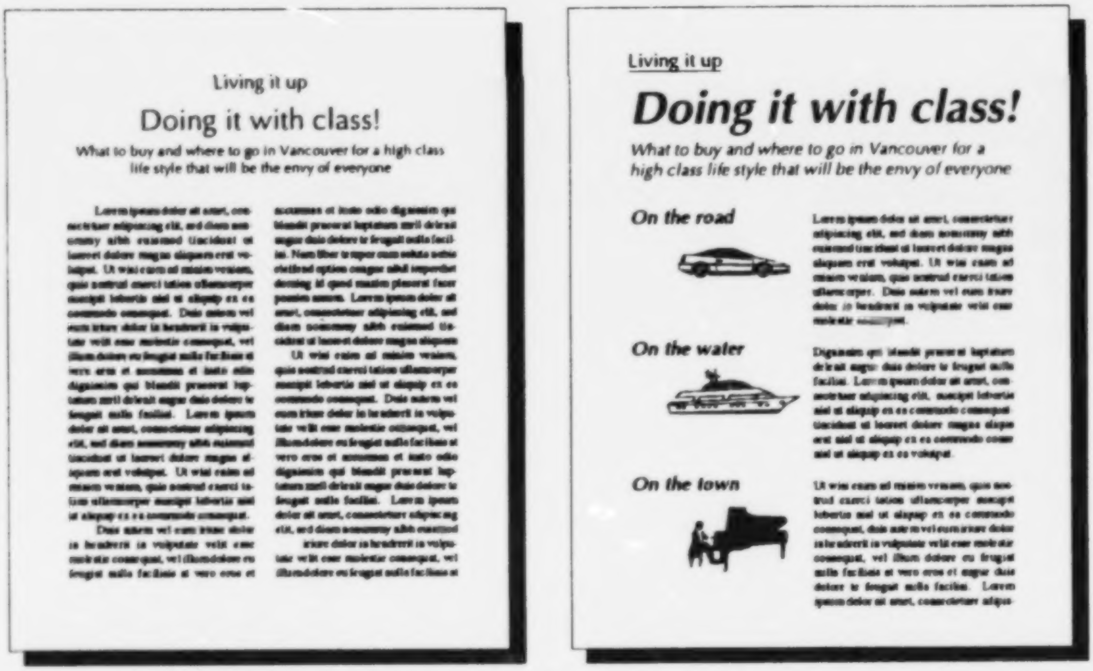
Three important words for desktop publishers. These three words represent the critical steps a reader takes when reading any document.

Remember that communication using printed material involves two main factors: message and medium. In addition to the words that convey the message of a document, publishers must also consider the visual impact of a document and the interest it creates. Your audience becomes your readers only after you have engaged them with the document you have printed. Understanding the basic steps in communicating a message, then, should help you to create readers out of your audience.

The three critical steps that all readers take are Scan, Skim, and Scour. Let's discuss each step in more detail.

- **Scan**

  Invariably, when a person encounters a new document, their eyes will move rapidly over the entire page. The mind is doing a quick assessment of the overall "look" of the page. Content is not as important as appearance during this step of reading. In fact, the mind is not really reading at all. Instead, the eyes are surveying a page for visual stimulation. This Scan step takes approximately two to ten seconds to complete. If document design does not generate any visual interest during the Scan step, the reader will probably move on. Designs must support the Scan step of reading to stay out of the waste paper basket!



Living it up

Doing it with class!

What to buy and where to go in Vancouver for a high class life style that will be the envy of everyone

Living it up

Doing it with class!

What to buy and where to go in Vancouver for a high class life style that will be the envy of everyone

On the road

On the water

On the town

Both pages have the same content. The design on the left, however, will not be read because it has not been designed to reach the reader during the Scan and Skim steps of reading. The number one problem with the design on the left is the lack of visual appeal, and the reader will move on because it does not generate immediate interest. The second problem is the lack of clues as to the content. There are no indications as to where specific content is located. The reader cannot easily find the content that is relevant and skip over the rest. The design on the right, however, is specifically designed to "hook" the reader in the first two steps of reading. Although there is less body text, this page has a much greater chance of being read.

- **Skim**

  During the Skim step the reader is evaluating the content of the document much more than the appearance. The mind is asking, "Why should I read this?" In-depth reading is not yet occurring. Instead, the eyes are trying to find relevant information for the mind to evaluate. This step takes approximately ten to thirty seconds to complete. If the document is not designed to bring important information to the reader's attention quickly, then the reader may move on even though the message may be of interest and importance. The Skim step ends in a significant decision. That decision is simply, "Will I read this or not?" Your design must provide easily accessed content indicators to assist the reader in making this decision.

- **Scour**

  This is serious reading and it is the ultimate goal of most publications. The reader has decided that the content is worth the effort required to scour the document for specific information. Many times the Scour step does not immediately follow the decision to read made in the Skim step. Busy people will often put material to be scoured in a separate pile to be read some

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time later. Also, readers often decide to scour only a portion of a document. This is simply because not all of a document's content may be of interest to any particular individual. As a publisher, you must realize that your documents must hook readers in both the Scan and Skim steps if you want them to proceed to the Scour step.

Four goals for your designs

There are four goals for your designs that logically follow this understanding of the three-step reading behavior of modern readers. These goals are:

1. **Get the reader's attention.**
   An obvious step perhaps, but you will discover that it is much more easily said than done. The page must contain items that generate immediate interest during the Scan step of reading. Remember that you have only four to ten seconds to get the reader's attention during this step. Ignore this first design goal at the peril of producing printed communication that never reaches first base.

2. **Draw the reader in.**
   The design must now incorporate items that hook the reader on the content of the document. Usually, the items that were used to catch the reader's attention don't contain much detail. Once you've got the reader to look at a document, you must give them clues as to the specific details of the message. As mentioned above, readers often do not read entire documents. The clues you provide should make the various parts of the message easily accessible.

3. **Keep the reader's attention.**
   This is critical once the reader has decided to scour some or all of the document. You must maintain two types of interest in your document. The reader must find the document visually appealing. Working in concert with this visual interest are the actual words used to convey the message. Interest in the content of the message is what you ultimately desire, but you must always remember the supporting role visual appeal has in the communication process.

4. **Make a lasting impression.**
   The ultimate goal of any printed material is to deliver the message intended for the reader. Usually people think of the text in a document when they think of the message, but lasting impressions can be made in each of the three steps of reading. In fact, some documents are designed to deliver their entire message during the Scan step and with a minimum of words. Communication involves conveying a mood, tone, and "feel"

for the message as much as it involves having the reader read the words for the content. The visual impact of the document is critical for supporting the written content of the publication. The reader picks up subtle messages from every aspect of your document. You must ensure that these subtle messages are consistent with the main thrust of the content.

The gateway to the mind

There are two characteristics all readers share that publishers must remember as they create printed material. The first is that the eyes are the gateway to the reader's mind. To be effective, documents must be designed to stimulate the eye so that it is naturally drawn to a page.

You must design for the eyes first. No matter how good the content, you must first get past the gateway to the mind.

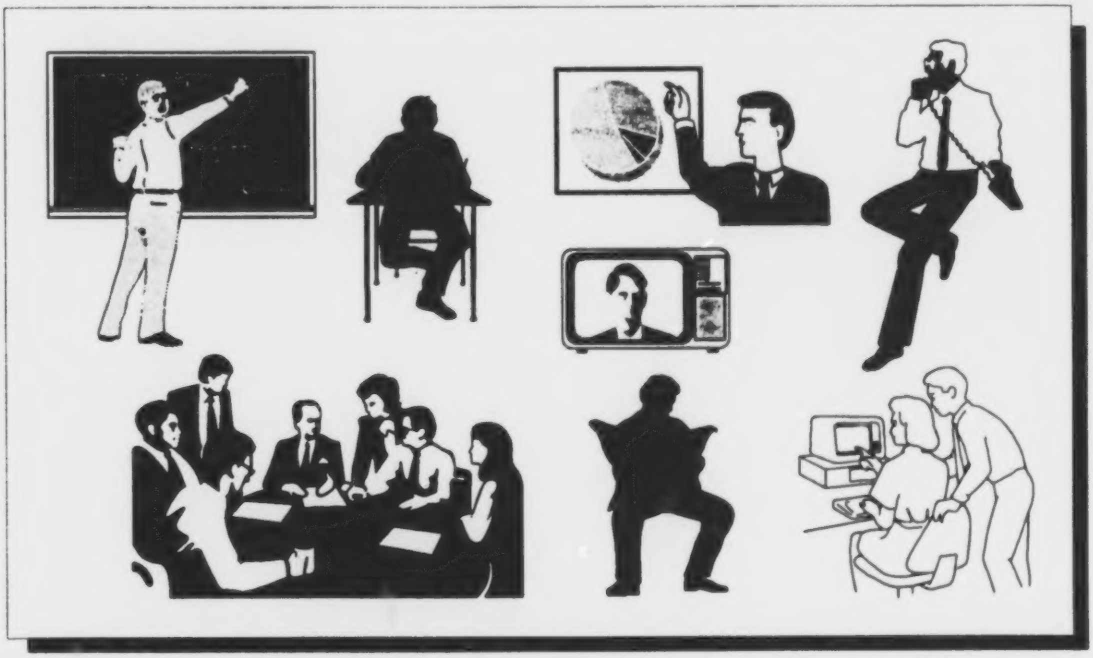
The reader's eyes will respond to certain stimuli automatically and without conscious thought. For example, the eye is drawn to areas of sharp contrast in shade or color. The eye is also drawn along straight lines. Remember that stimulating the eye increases the potential for your publications to arouse the interest of your audience.

Attracting the eye and keeping it stimulated is known as the visual interest of a document. Creating and maintaining visual interest is essential to gaining access to the mind and keeping it interested long enough to deliver your message.

Human nature

The second human characteristic to remember is that the reader's eye and the mind that controls it are inherently lazy. Most people will choose the path of least resistance whenever work, especially tedious work, is to be done. Designing with this in mind is critical because your readers will not be immediately interested in much of the material that you publish. If your document looks like a lot of work, the reader's natural response will often be to simply ignore it altogether.

To make matters worse, the messages being communicated to readers are increasing in frequency and scope at the same time the attention span of readers is getting shorter and shorter. Most of the people who make up your audience live in a fast-paced environment that is continually trying to put ideas in their heads. This information bombardment results in a resistance to communication. Combine this resistance with the reader's natural desire to avoid anything that looks like work, and you've got a colossal problem facing you as a publisher.



Just stop for a moment and consider all of the sources of information there are in your life. The western world is so stimuli-rich that modern readers develop defences to keep messages out so they can maintain their sanity.

The bottom line

How can you design your work so that it catches the reader's eye in an environment overloaded with information? How do you design your work so that it has visual appeal, but does not look like a lot of work to the reader, especially when you have a lot to say? There is an important principle of design that logically follows from these questions. The bottom line is that simplicity of design is the most effective tool you have in your design toolbox. If a document appears cluttered and there is no clear path for the eye to follow, the result is often confusion for the reader. Once a reader is confused by the design of a document, only the truly motivated will persevere. Most can't be bothered to continue and nothing further is communicated. But when the reader can be drawn into the content of a document quickly and efficiently with a design that is straightforward and logically organized, you have a very good chance of communicating something.

> *"We are bombarded with material... We are like a thirsty person who has been condemned to drink from a fire hydrant. The sheer volume of available information and the manner in which it is often delivered render much of it useless to us."*
>
> *Richard Saul Wurman*
> *Information Anxiety*

Look at the ads in the newspaper or a magazine. The ones that deliver their message most effectively will be simple more often than not; simple, but clever. You must not think that simple designs are unsophisticated or that they are easy to do. In fact, you may put more effort into creating an effective simple design than you would to create a complex design that is confusing to the eye. You must look at what makes good design tick so that your work will become more effective.

Design begins before you start laying out a page

You cannot create effective designs for your publications unless you have some background information regarding your message and your audience. There are important questions you must answer before you start thinking about what a particular document will say or how it will look. The importance of acquiring this background knowledge cannot be overstated. The effective writing, organization, and design that make for a successful publication can only result from a clear understanding of the message to be conveyed, the nature of the target audience, and the practical constraints of time and money. To help you obtain this valuable information, it is important to discuss a design preparation checklist that should be followed before you begin laying out a page.

> "Effective communication is a result of understanding."

All the graphic design in the world won't help you if you don't have some basic knowledge of the task to be accomplished.

The servant's attitude Before discussing specifics, it is important to mention an overall approach to design and publishing that is very useful in producing effective documents. When publishing material for someone else, always remember whose work it is that you are working on. You are creating a vehicle for communicating someone else's ideas to their target audience. Don't jump to conclusions and don't make assumptions. Ask all the questions listed here and, wherever possible, formulate your ideas for the document's layout *after* the questioning is complete. Experienced publishers know the value of approaching design with a servant's attitude.

The design preparation checklist

This checklist will help you to determine the relevant background information that will be needed before you begin page layout. It covers the major questions that should be asked of yourself or your customer.

1. **What is the message?**
   - What is the need your document will meet?
   - What is the written content?
   - What format will best suit your document?
   - What is the image to be projected?
2. **Who is the message for?**
   - Who are they?
   - Where are they?
   - What is their interest level?
3. **Where is the cost/quality compromise?**
   - What features are desired in this document?
   - How much time do you have?
   - How much money do you have?

The answers to these questions will provide a solid base for the rest of your design work. Let's discuss each point in the checklist in detail.

What is the message?

Before you ask anything else ask, "What is the message?" The answer will determine the other questions you ask, and it will influence the emphasis you place on the answers you get. Your design will be a natural consequence of this knowledge.

There are a number of further questions that must be asked to get a fully rounded understanding of the message to be conveyed. These questions fall into four categories.

- **What is the need your document will meet?**
  Will this publication be promoting a company or product? Will it be informing the reader of a development in a professional field? Will it provide "how to" instructions for assembling a complex piece of equipment? Zeroing in on specific needs will help you determine the form the document will take, and it will guide you as you write and organize the content.

- **What is the written content?**
  For most documents you will produce, this is clearly the most important question you must ask. There are two reasons. First, the written content is the main vehicle for communication for the vast majority of documents. Second, and more importantly,

you cannot properly apply the principles of graphic design to support the Scan, Skim, Scour steps of reading unless you know the message contained in the written text. A knowledge of the hierarchy of relative importance of the various points in the information to be conveyed to the reader enables you to set up appropriate proportions on the page, to highlight certain points for the Skim step of reading, and to use your understanding of graphic design and page layout to enhance the communication of this message.

Effective document design is a natural consequence of your knowledge of the message to be communicated.

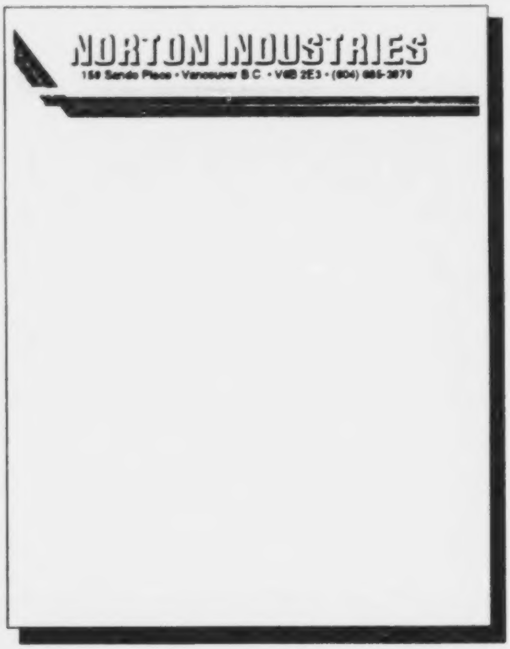
Here are some questions to ask. What is the central point in the message being conveyed? What is the relative importance of the other points in the message from the most important to the least important? Has the text been completely written, proofread, and edited? What text will you be expected to write? Headlines? Subheads? Pull quotes? The entire document? What freedom will you have to rewrite the text to better meet the need you have identified? Be particularly clear on the licence granted you to edit text that has already been written. Rewriting text that someone has sweat blood over for three weeks can be extremely hazardous to your health!

- **What format will best suit your document?**
  There are many types of documents. Based on the need you have identified and the content of the document, you must select a format that will most effectively communicate this message. Here are a few examples of documents in the four main categories of publications:

  - **Documents that identify:**
    - Awards
    - Business cards
    - Certificates
    - Diplomas
    - Letterhead
    - Stationery
  - **Documents that inform:**
    - Announcements
    - Bulletins
    - Brochures
    - Catalogues
    - Directories
    - Journals
    - Magazines
    - Menus
    - Newsletters
    - Newspapers
    - Price lists
    - Programs
    - Reports
    - Timetables
  - **Documents that promote and persuade:**
    - Advertisements
    - Banners
    - Flyers
    - Invitations
    - Posters
    - Sales brochures
  - **Documents that must be filled out:**
    - Applications
    - Invoices
    - Order forms
    - Packing lists
    - Registrations
    - Questionnaires

- **What is the image to be projected?**
  The overall impact that a publication makes on the reader is created from every aspect of the document. The reader will pick up impressions through everything from the quality of the paper to the shapes of the letters used to print the text of the document. Thus, you must consider what messages each aspect of your document communicates and decide whether it is consistent with the image that must be projected.

Another factor may affect the design process regarding the image that a document must project. The company or organization for whom you are publishing this document may have an established style or a set of standards that is part of its identity. Your document may have to conform to certain style guidelines or even strict rules for the format of a document.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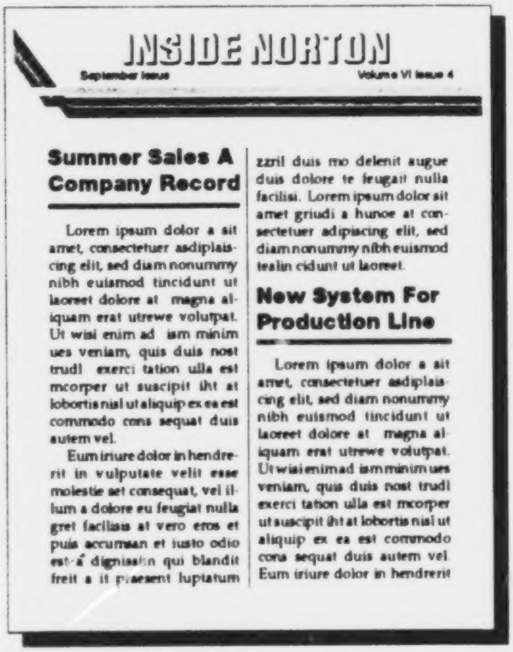
INSIDE NORTON
September Issue
Volume VI Issue 4

Summer Sales A Company Record

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New System For Production Line

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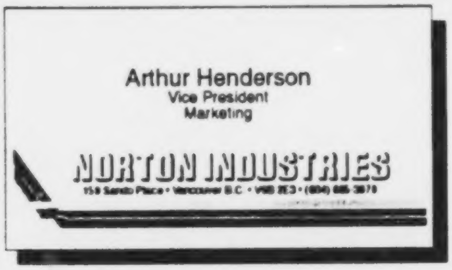
Arthur Henderson
Vice President
Marketing

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Companies often have a consistent look that identifies them. This look has been called the visual signature of the company, and it is an important part of their image. Most major corporations have visual signatures, and all published material must conform to the established appearance. Here you can see the visual signature of Norton Industries. If you are contracted to design a new brochure for one of their products, you must be conscious of their visual signature and the image that it creates.

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Who is the message for?

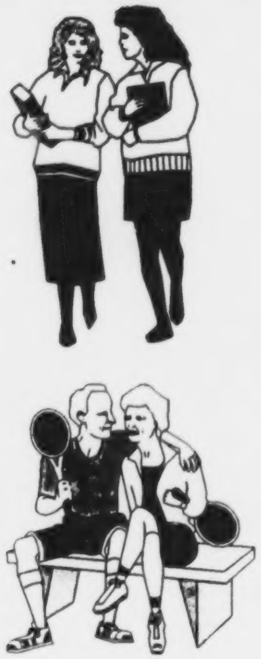
Readership vs. audience

As mentioned earlier, there is a difference between your audience and your readers. You only gain readers if you can involve members of your audience in the document you have published. The more complete your understanding of your audience, the better you can select techniques that will engage them. The questions to ask regarding the attributes of your audience fall into three categories.

- **Who are they?**

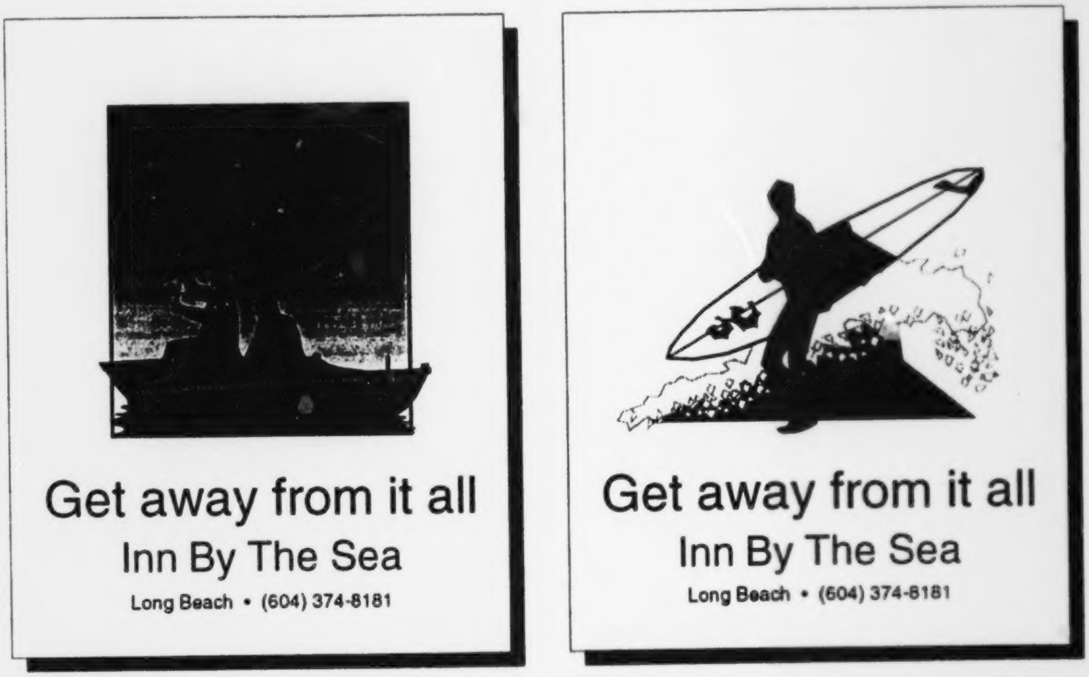
  Are you targeting a specific group of people with something in common or will your document appeal to a wider, general audience with less in common? What are the characteristics that the members of your audience do share in common? How old is your audience? What is the range of ages? Does your message appeal to one sex more than the other? Does your message appeal to a particular ethnic group? If your message is income sensitive, what income level are you targeting?

The answer to these questions provides a foundation for your design and writing. If you are designing a brochure for a seaside resort, for example, the features you highlight for an audience of senior citizens will be significantly different than those you highlight for families with young children or those you would highlight for teenagers. The vocabulary used in an advertisement for owners of large sail boats may confuse the general public and yet be extremely effective with the target audience. On the other hand, an advertisement for a new family car may be very ineffective if vocabulary is used that assumes more knowledge than the average member of the audience will have. In both cases, knowledge of the audience is essential for the effectiveness of the publication.



Consider designing an advertisement for a vacation spot that will reach the two groups of people represented here. Will one design work or will the differences in age necessitate two completely different approaches?

The failure to correctly determine the nature of the audience has led to some of the most famous disasters in publishing. Consider this hypothetical example. A publisher has been contracted to design a new logo for a major corporation. After careful consideration of the image to be projected, it is decided to use a person's hand as the central graphic for the company's identity. The company officials are pleased with the design and adopt it immediately for North American operations. Within a few months the new logo is sent overseas for use in the company's European and Asian offices. In the middle east, where the display of a person's bare palm is considered an obscene gesture, sales plummet. Within two weeks of the introduction of the new logo, fires have been set at two of the company's



Get away from it all

Inn By The Sea

Long Beach • (604) 374-8181

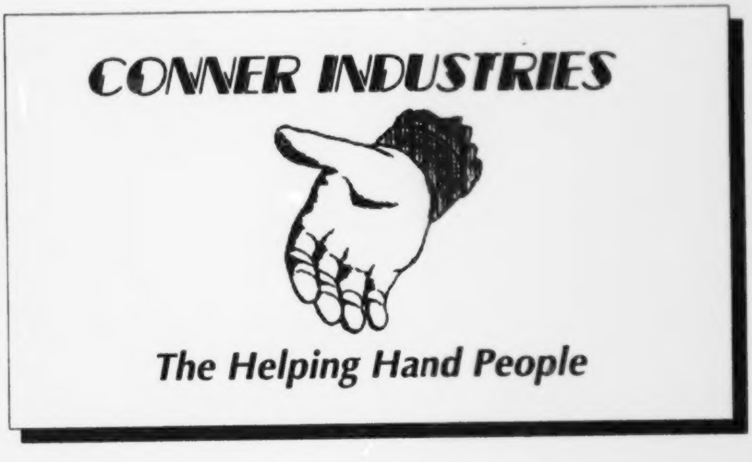
Get away from it all

Inn By The Sea

Long Beach • (604) 374-8181

Here are two advertisements for the same sea-side resort. The contrast in the ads is due to the differences in the target audiences. The ad on the left is directed at middle-aged people and seniors. The ad on the right is directed toward a much younger audience. As you can see, in publishing, an understanding of who will be reading your documents is critical.

offices and several cars have been damaged. Needless to say, once the source of the problem had been determined the company's opinion of the new logo and the people who designed it will undergo a radical change. The need to do your homework on the nature of your audience is critical in the design of effective documents.



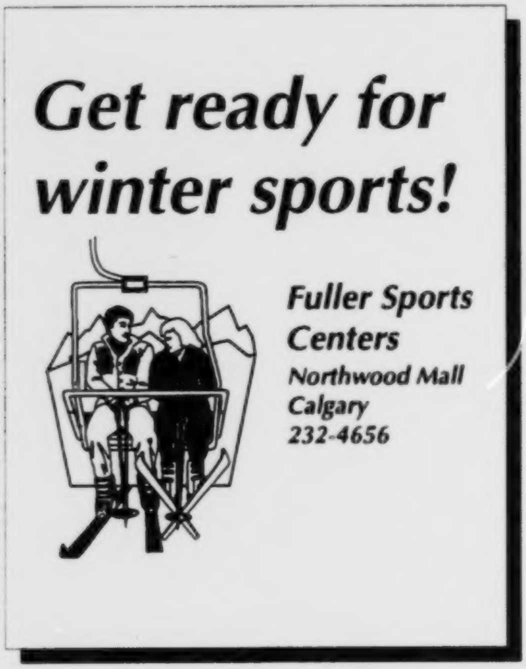
CONNER INDUSTRIES

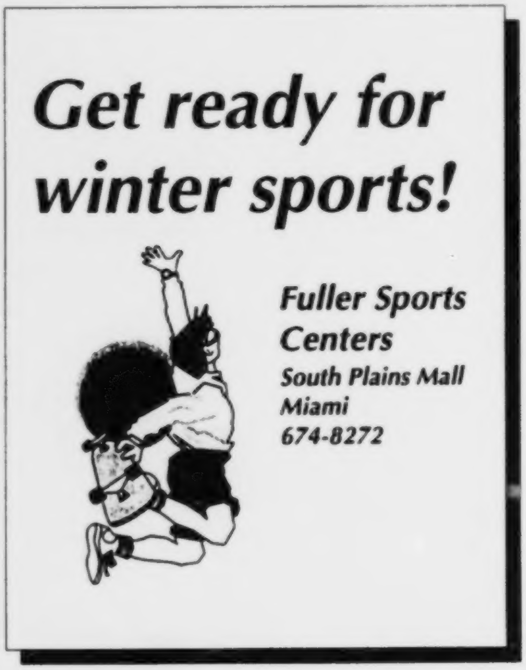
The Helping Hand People

A seemingly effective logo design. But the effect can be radically different from intended if you don't have a complete understanding of your target audience. In certain parts of the middle east, the display of an open palm is considered an obscenity. How do you think the people there would respond to this logo?

- **Where are they?**

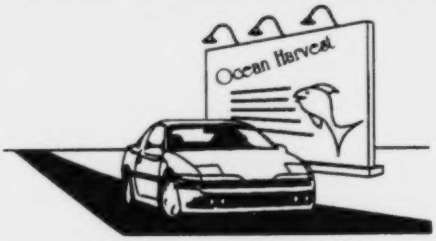
  Have you ever strained to read some details on a poster because you couldn't get close enough to read it easily? It may be that the designer didn't consider where the poster was going to placed relative to where the audience would be when they read it. Or maybe the designer didn't even bother to ask! A classic example of this very thing was a poster that was put up in a large office tower announcing an important tenants meeting. The poster was laid out effectively and contained all of the relevant details for the date, time, and place of the meeting. The only factor overlooked was that between the poster and the people was a small fountain and pond. The text on the poster was too small to be read at that distance. While one person was noticed wading through the pond in bare feet and rolled up trousers, most of the audience showed a lesser amount of initiative, and the message was unread. Considering where your audience will read your document is another important step in successful design.





Notice the effect of the audience's location on design. Both ads are promoting the same chain-wide sales event. But the people in Calgary will be interested in far different winter time sports activities than those in Miami. To use the same ad for both locations would obviously be ineffective with one group of people.

There are several factors to consider when designing for the reader's location. On a large scale you must determine the impact geographical location will have on your document. An advertisement for winter home improvement projects will likely be quite different for homes in Phoenix, Arizona than for homes in Edmonton, Alberta. In this case, the message must change to suit the location. Regional differences may also necessitate different designs for the same message. For example, designing an anti-drug poster using a picture of inner city drug users may be very effective in large cities. However, the poster may not have the same effect in rural farming communities even though drug problems may exist.



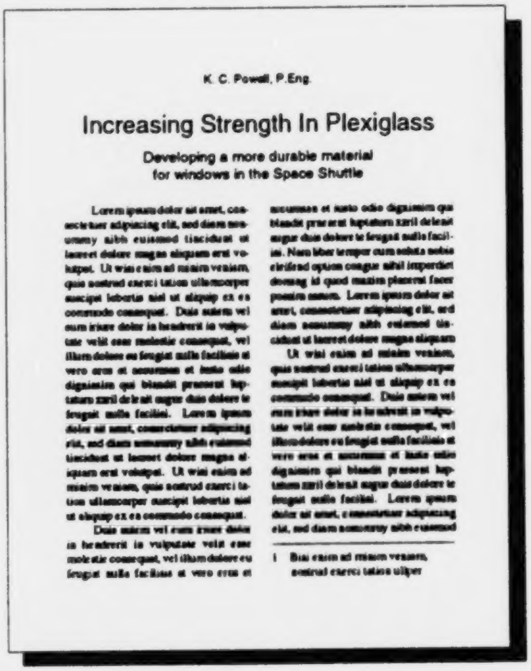
Another apparently good design that fails to succeed simply because a complete assessment of the audience and their location was not done. Even if this design does generate some initial interest in the content, the details are to numerous and too small to take in while driving.

The location of the audience must be considered on a smaller scale as well. The example of the poster behind the pond is a case in point. Another example is an advertisement designed to promote a fine seafood restaurant in a large urban center. The advertisement was well laid out and had considerable appeal. The only major piece of information that had not been determined was that the ad was to be placed on a large billboard beside one of the major streets in the city. The problem was that there simply too much text to be read by an audience that was travelling by at 60 kilometers per hour!

To ensure that your designs are truly effective, you may have to consider your reader's location on an even smaller scale. The distance between the page and the reader's eye can be critical for certain publications. For example, a large procedures manual for a manufacturing firm that is several hundred pages in length may require special attention with respect to the distance between the page and the reader. Due to the sheer number of pages this document will be three hole punched and held in a binder. The binder will lay flat on the workbench so that it can be opened wide to expose all of the page. The weight of the manual will mean that it is not picked up when it is read. The manual is intended for use in the firm's workshops where there are no desks or chairs, only workbenches. If this is not taken into account in the design of the manual, the diagrams and text may be too small to be easily read when a person is standing.

The consequences of this seemingly slight oversight can be much greater than you might imagine. The manual may be ineffective because the message is difficult to read and is ignored whenever possible. This may result in lost productivity or even safety problems in the shop. Another result may be workers developing neck and back pains from always bending over to read the manual. Eye strain can also result from this situation. In these last examples the design of a document has actually caused physical harm because the analysis of an integral part of someone's job was not thoroughly thought out. Understanding the implications of where the audience will be on both large and small scales is one of the most important steps in the preliminary thought process of document design.

- **What is their interest level?**
  The design, writing, and organization of a document may vary significantly depending on your audience's interest in the message you have to communicate. For example, an article written by a structural engineer explaining the development of a new type of extremely hard plastic for use on NASA's space shuttle will generate immediate interest when published in a journal for professional engineers. For this target group, you will have to do little more than get the reader's attention because such a product would have widespread engineering applications. Any further design tricks may actually hinder the communication process. Engineers possess all the background knowledge necessary to understand the article. The design could be very simple with little else than the title and a brief abstract of the article's content.



K. C. Powell, P.Eng.

Increasing Strength In Plexiglass

Developing a more durable material for windows in the Space Shuttle

The design of this document is straightforward. The target audience will be sufficiently attracted by the title and short lead-in to work their way through the material.

But now consider the problem of communicating this message to high school students in eleventh grade. This article does not generate immediate interest in the majority of this audience. Furthermore, they do not possess the background knowledge required to understand the article as it was originally written. Your design must work much harder to catch the attention of this audience and draw them into the content. Additional information must be added to provide the background neces-

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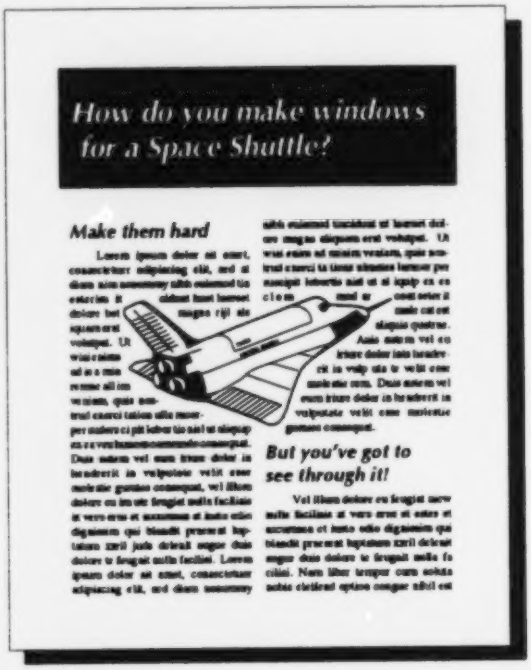
sary to grasp the article's significance. The message itself must be rewritten at an appropriate level and with a shift in tone in order to emphasize the exciting changes this product will bring. The entire document's design must be much more dynamic and upbeat than the design for engineers.



How do you make windows for a Space Shuttle?

Make them hard

But you've got to see through it!

The design of this document is more complex and dynamic to attract and keep the attention of the target audience. The high contrast and graphics are added to do just that.

As you can see, your audience's level of interest in the message you have to communicate has a major impact on the document's design. Remember, however, that when considering your audience's interest level, you must consider the interest level they *should have* in the message. For example, a computer programmer may not be particularly interested in reading anything as she sleepily makes her way from the bus station to the office. But if the electricity for the building will be shut off for three hours that morning, then it is imperative that you do get her attention. She does need this information.

There are several factors to consider when determining the interest level of your audience. Is the reader a willing participant in the communication process? Will this document be read during the reader's leisure time or will it be required reading as part of the reader's employment? Is the message unpleasant, as in the case of a poster outlining the consequences of smuggling, for example? Is the message urgent? Safety warnings in sawmills contain urgent messages. How important is the message? An announcement for a meeting to decide new rates for property taxes and assembly instructions for a new table saw may be much more important than a promotional flyer for a

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new type of plumber's putty. With this document, are you trying to create interest in a product or idea to which the audience is, at best, indifferent or even resistant?

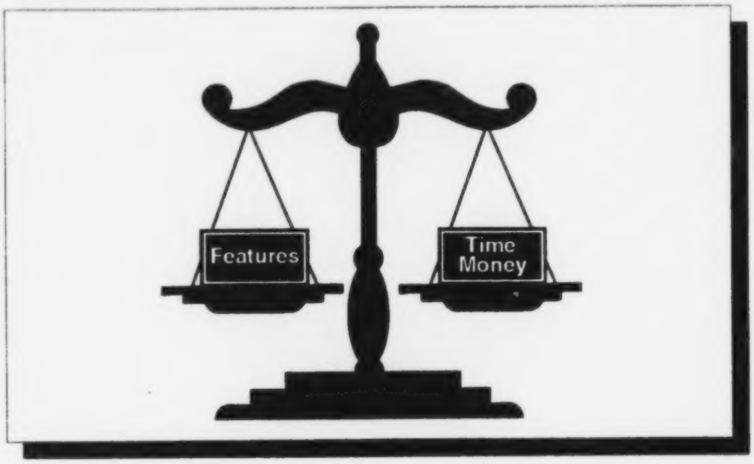
The answers to these questions have a direct impact on how a document is designed. The techniques described further on in this book can help you facilitate the Scan, Skim, and Scour steps in reading, but you must decide when and where their use is appropriate. Determining the degree of interest your audience will have in the message you have to communicate is perhaps the most important step in design because so much of what you do with a document is affected by this factor.

Where is the cost/quality compromise?

Publishing, whether you use traditional or electronic desktop techniques, is more than the preparation for, and design of, creative and artistic publications. It is also working under impossible deadlines with ridiculously low budgets for people with unbelievably high expectations. Time and money force you to compromise what you know you could produce if those constraints were removed. This is perhaps the most difficult aspect of working in commercial art. If you are an artistic purist or a perfectionist who must produce every document to exacting standards, publishing will either shatter those expectations of perfection or it will drive you to drink. Creating that perfect design just can't be done most of the time.

Every feature you add to a document has a cost associated with it. The design preparation we have been discussing takes time to complete. So does the page layout. And as the old saying goes, time is money. The quality of paper you use, the number of colors that will be printed, the type of artwork or photography that will be included, all have their costs. You must find the balance between effective, artistic design and the reality of time and money. Picture the following four factors on a teeter totter: design preparation, document features, time, and money. Design preparation and features are on one side and time and money are on the other. If you have less time or money, then to keep the balance, you must do less preparation and/or include fewer features in the document. We have already discussed design preparation steps. Let's look at the other three factors on the cost/quality teeter totter.

- **What features are desired in this document?**
  Setting up tables, producing charts and graphs, and running text vertically up the side of the page all require time and effort. This is where the electronic desktop tools can make many of the tedious, time consuming traditional processes for producing



The classic balancing act of producing documents. To be successful in publishing, you must always balance what you want with what you can afford.

these features quick and effortless. However, not all tasks are quicker with computers, and the more features you add, the longer it will take you to produce the final document. Here are the major features to consider when determining the cost of producing a publication:

- **What materials will be used?**
  Will you use high quality glossy paper, or will you print on newsprint? Remember that the answer to this question may determine a great deal about the rest of the document's deisgn. There is no use spending a lot of time creating drawings with intricate detail and printing your camera-ready master on a high resolution Linotronic printer if you intend to reproduce the document on cheap newsprint. By the time the ink has soaked into the paper all of the detail you spent so much time on will be lost. What kind of binding will be used? Will the document require covers made of a different material than the rest of the publication? Is any special packaging required?

- **How many colors will be used?**
  Many documents require only two colors, the ink and the paper the document will be printed on. Production of two-color documents is relatively straightforward. It is when additional colors are added that things become a little more complex. When multi-colored documents are printed, they are run through the press once for each color of ink being used. This means that separate printing plates must be made that print only the page elements that will have one specific color. Creating the camera ready masters, called color separations, for the printer can be a complicated business. In addition, alignment guides, called registration marks, must be placed on each separation so

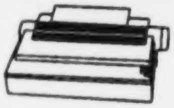
that each color matches exactly the location of the other colors that will be printed on the page.

- **How will the camera-ready masters be produced?** Camera-ready masters are the final pages used for the reproduction process. Rarely will dot matrix printing be acceptable for masters. Most often higher resolution output is required. This means you will want your masters to have the 300 to 800 dots-per-inch quality of laserwriter printing or the typesetter quality of Linotronic printers (up to 2540 dots per inch). If you don't have the required printer in your office, you must send your files to a service bureau for printing. With a set deadline this will mean less time for you to produce the document. This also adds another level of complexity to the production process. You must ensure that the service bureau has the same software you have been using, as well as copies of the same type faces you have used in the document. Of course, the greater the resolution of the camera-ready masters, the greater attention to detail that must be given to the production of those masters.

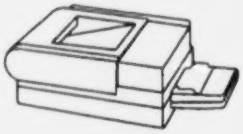
- **How will the document be reproduced?** If the document is going to be photocopied, a lot of the fine detail and subtleties of shades may be lost. On the other hand, if the document is to be printed by a professional printer on a high quality four-color press, much more attention to detail will be required. You must gauge your effort (and cost) to match the quality of the final output of the reproduced document.

- **What features in the written content are required?** The content of most documents will require more than just typing in the message. There are many elements and techniques that can be included to help convey a message. There are headlines, subheads, pull quotes, headers, footers, tables, footnotes, glossaries, indexes, and many more to consider (these will be explained further on in this book). Each one adds time to the design and production of a document, some much more than others.

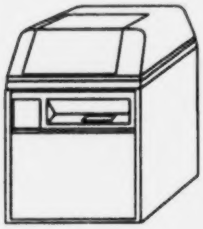
- **What kind of art and/or photography will be used?** The production of charts, graphs, diagrams, and illustrations can be time consuming, even with electronic tools. There is a great deal of difference between including artwork that has already been produced and artwork you must create from scratch. In the case of photography, scanned image resolution may be adequate for some



ImageWriter II



LaserWriter II



Linotronic

As a desktop publisher you have several options for the quality of your printed output. The quality is determined by the number of dots per inch (dpi) that the printer is capable of printing. The three main levels of quality are represented here. The ImageWriter is a dot matrix printer capable of 72 dots per inch. The LaserWriter is capable of 300 dots per inch. The Linotronic is capable of up to 2540 dots per inch.

documents as long as the images are black and white. If the photographs are to be printed in color, however, you must get your printer to produce the color separations, and these must be added to your work at printing time.

- **How much time do you have?**
  In the previous section we outlined the some of the features that make for an effective document. Now we begin to look at the other side of the cost/quality balancing act. One of the major constraints to including all desired features in a document is your time. For example, there is no use contemplating a four-color poster design with several scanned photographs and special typographic techniques if it's now 8:30 a.m., and the customer needs the poster designed, masters produced, and 900 copies printed by 11:00 a.m. the same morning! In this case, it doesn't matter how much money they may have for the job because the deadline is so restrictive that no amount of money is going to get more than the most straightforward design for this poster.

> *"One of the biggest problems is that the tools allow someone to go on modifying a document forever, long after a workable version has been developed. A major concern for many businesses that are implementing desktop publishing systems is that their people don't lose touch with a realistic balance between effectiveness and time."*
>
> *Paolo Bertoia*
> *Desktop Publishing Consultant*

  However, deadlines are not always a curse. Without them you could continue refining a document long after a useful, cost effective design had been created. One of the greatest pitfalls in desktop publishing is that the tools allow you to easily change a design. You can become so focused on creating a perfect design that you lose track of the balance between time and features. A final deadline and deadlines for intermediate steps in the design and reproduction of a document keep your work moving forward and guard against wasting time.

  To determine the impact of time on the desired features for a document, start at your final deadline and work backwards. As you move back from reproduction to initial design and design preparation, the amount of time required for each step will become evident. If there is not enough time to produce the document as it was originally desired, then the compromise process begins. You must start modifying and/or reducing desired features until a realistic balance between time and features is reached. The basic principle is that the less time you have, the simpler the document must be.

- **How much money do you have?**
  Money is an ever present constraint. If you are working for someone else, then the question becomes simply, how much money can they afford? If you are publishing material for yourself, which is often the case in desktop publishing, the question is a little more complex. When you are working on a publication, you may not realize the true cost of that endeavor. The

cost of materials is relatively easy to calculate. But the cost of the time you spend is much more difficult to assess. The time you spend on any one document is time that is not spent on other documents or anything else you could have been doing. If you spend an inordinate amount of time on a single publication, there is not only the cost of the time you have spent on that project, but also the cost in terms of lost productivity for other projects.

As in the case of determining the impact of time deadlines on the production of a document, if a publication cannot be produced in the desired form within the budget allowed, you must once again enter into the compromise process. The document must be modified and/or features removed until a realistic design specification has been set that can be produced within the amount of money available.

Summary

There is much more to good, effective design than simply picking up a pencil and sketching in where the text and graphics will be placed on the page. Effective design is a consequence of understanding. You must know what you are trying to communicate, who you are targeting this communication for, and what constraints of time and money you are working under. Spending the time to determine the content and importance of these factors will provide the foundation on which you can build the rest of your document.

Chapter three

Principles of design

> "Basically, a graphic designer's job is to be a translator, to put information into a visual form that gives people a better understanding of the content."
>
> Wendy Richmond

Chapter three

Principles of design

The challenge of design

A frustrating dilemma many desktop publishers face is that if they possess such powerful graphics and publishing tools, why don't the documents they produce look better? The message to be communicated is known, the audience has been identified, but somehow the final output just doesn't get the desired response. What is needed here is a basic understanding of how graphical elements communicate to the reader. This understanding is rooted in the principles of graphic design. Before we plunge headlong into the "how to's" of design, however, there are a few important points to make regarding the foundation of your designs.

A goal for your designs

Everyone has a natural feel for good design that can be used in your desktop publishing work. We normally call this a person's taste or preference. Haven't you ever found yourself attracted to a poster or advertisement? Haven't you ever found a particular page unappealing? These are indications of your natural ability to appreciate graphic design. By applying the design principles outlined in this book and using your natural feel for graphic design, you can produce aesthetically pleasing and effective documents. They may not win awards, but they will be attractive and useful. This should be your goal.

Learn the conventions of design

Have you ever noticed how most newsletters look similar? There are variations of course, but the basic underlying structure is the same. The designers have used one of the many accepted and unwritten conventions in design. They make the job of design much easier and more automatic than having to spend the time and energy required for unique new ideas.

These conventions in design create expectations in the audience. Knowing these expectations is very important for two reasons. First, deviations from what your readers are expecting can range from minor irritations to major obstacles that cause confusion and hinder communication. Second, designers will occasionally break with convention for great effect. Often very clever designs can only be truly appreciated in the context of all the other designs that were produced at that time. Only then can you see how a particular designer has done something that was quite different for enormous impact.

Like using curry powder or jalapeno peppers when cooking, however, breaking with convention should be done in small amounts. The conventions in design are based on the principles that are outlined below. Learning these principles is the first step in learning the conventions in design.

Principles of graphic design

Guidelines, not rules

Be honest with yourself: what you want this section of the book to give you is the cook book, step-by-step recipe for sure fire great designs. You want to get a set of rules that, if followed religiously, will guarantee attractive and effective documents. Unfortunately, this cannot be done.

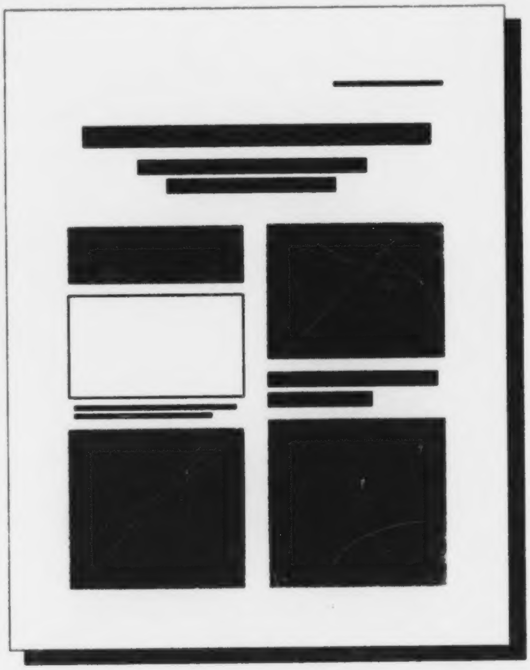
One of the most challenging aspects of learning graphic design is that you will often see designs that disregard what you thought were the basic ground rules of the endeavor. Not only that, the designs that break the rules are often some of the most effective designs you encounter! The reason that the rules of design are not strictly adhered to is simply that they are not rules at all. Instead, they are principles that guide, but do not constrain a designer.

As a newcomer to design, however, you are strongly encouraged to learn these principles thoroughly and not stray too far from the straight and narrow until you have mastered them. The principles can be ignored for great effect, but you should know when you are doing so and for what reason. Most of the time, designers are guided by the principles outlined here.

The building blocks of design

You will encounter the terms page item, page element, and page object in this discussion of the principles of design. All three refer to a single graphic or block of text placed on a page. These items are the building blocks of design. Each has its own attributes that must be considered in design.

To see what is meant by the attributes of a page item, open a magazine to a page that has some text and some photographs, diagrams, or illustrations. Hold the page at arms length and squint your eyes so that the detail of the individual objects disappears in a blur. You will notice that the various items on the page have a location, a size, a shape, a shade of lightness/darkness, and possibly a color. Photographs are usually rectangular, as are large one-line titles set in all capital letters. Multiline titles or lead-ins can have irregular shapes. Blocks of text are usually rectangular in shape, and the size and density of the type gives the block a particular shade (blocks of text are considered a single page item). All of these are the attributes of the page items.



When you look at a page from the perspective of design, you see only objects: rectangles, ovals, etc., not words or pictures. Fine detail is not important. Instead you deal with the placement of objects that have a shape, size, shade, and color.

There are six basic principles that should guide a publisher as he or she designs any document. These principles are proportion, balance, contrast, rhythm, white space, and unity. Let's discuss each of these in detail.

Proportion

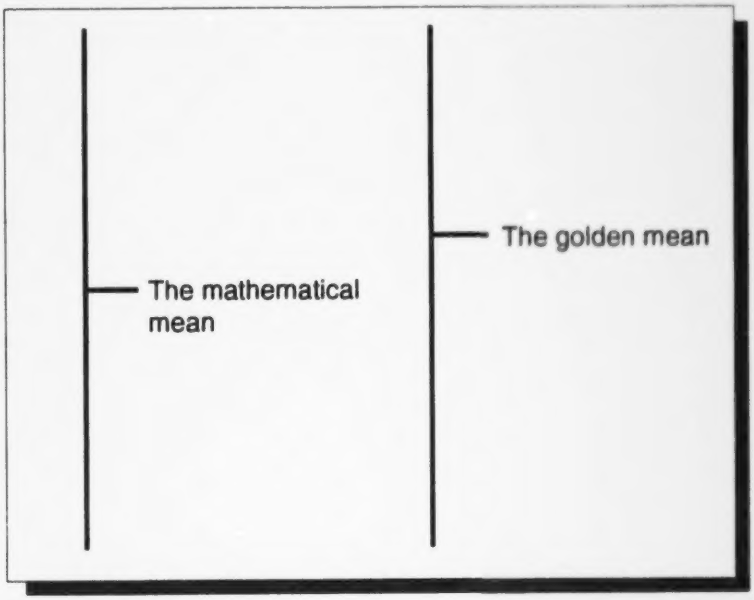
The term proportion applies to design in two ways. The first is the relationship between the dimensions of a single item on the page. The second application of proportion to design is the relative size of all page items. Let's begin by examining the dimensions of a single item.

Proportions of a single item

If you had to divide a line into two sections, where would you place the dividing line? Most people would cut the line at the mathematical center into two sections of equal length. But there is something awkward about this proportion of 1 to 1. Just look at the line on the left on the following page, which is divided at the mathematical mean. The dividing line appears to be too low. Now look at the line on the right that is divided at the golden mean. This division of the line into two sections of unequal length is more pleasing to the eye.

The ancient Greeks discovered the golden mean. It divides a line into two sections of pleasing proportions. The ratio of the length of the two sections is an irrational number: a decimal that goes on forever but never repeats itself. It is approximately 1 to 1.618 (1.61803498...).

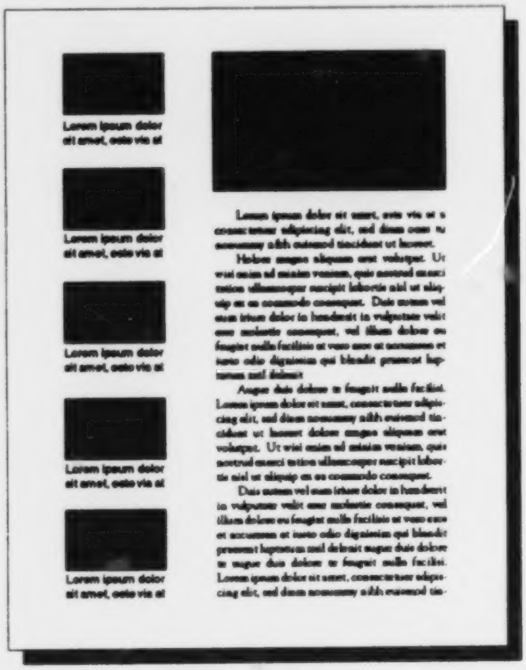
Both of these lines are 3 inches in length. Divide 3 by 2 to find the mathematical mean of 1.5 inches. Divide 3 by 1.618 to find golden mean of 1.854 inches. There are two locations for the golden mean. You can either measure the 1.854 inches from the top or from the bottom.



The golden mean can also be used to create a rectangle with pleasing proportions. A line is divided in two using the golden mean. The two sections are then used for the sides of the rectangle. This is called the golden rectangle. The Greeks used the golden rectangle extensively in their architecture, the most famous example being the Parthenon. The golden rectangle is still widely used in architecture today. Its proportions suggest stability and peace.

Here is a golden rectangle made from the 3 inch line shown above. The two sections that resulted from dividing the line at the golden mean have been used for the sides of this rectangle.

The golden rectangle is also widely used in design. In publishing, the most common shape for a page item is a rectangle. Blocks of text, photographs, even the page itself are more often rectangular than any other shape. Many publications are designed so that two open pages form a golden rectangle. Blocks of text are designed to fit into a rectangle of golden proportions, often turned on its side with the longest side of the rectangle running vertically on the page. Photographs are often cropped into the shape of a golden rectangle. Remember this rectangle as you put your pages together. Many designers set up layout grids for the placement of page items that are based on the golden rectangle. You will learn more about layout grids in greater depth later on in this book.



Each of the items on this page is a golden rectangle. Even the body text is placed in a golden rectangle that is turned on its side. The golden rectangle is pleasing to the eye and is often used in design.

Proportion of relative sizes

The second application of proportion to design is the relative size of all objects on a page. This aspect of proportion occurs as soon as you place two or more objects on a page. The size of each object should be based on the importance of the object in the message to be communicated. Larger items should be more important since they will be noticed first. There is no formula for determining the size of an object so the size must be determined by the setting for that object. The size of an object must be relative to the size of the other objects on the page and their importance in the message of the document. Generally the rule is that more important items should be larger than less important ones.

The sizes of objects on a page should generally follow the principle of telescoping. That is, the size of objects should progress from large to small in a series of steps without huge jumps, just like the sections of a telescope. In design, this is termed the diminishing visual impact of objects, and it is closely linked to the message to be communicated. It must be remembered that proportion applies to type as well as to graphical objects. With type, however, it is the size of the individual

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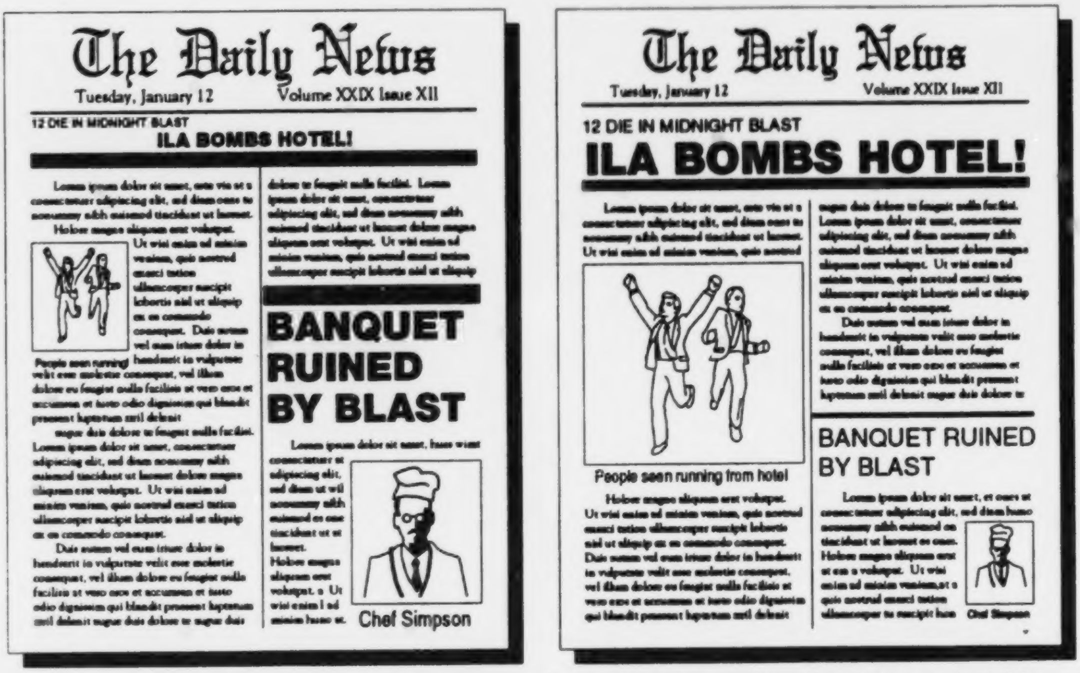
characters that is important, not the size of the entire block of text. Body text may take up most of the page, but the one or two title lines set in a larger size will be noticed first.



The Daily News
Tuesday, January 12 Volume XXIX Issue XII
12 DIE IN MIDNIGHT BLAST
ILA BOMBS HOTEL!
People seen running from hotel
BANQUET RUINED BY BLAST
Chef Simpson

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The relative size of objects conveys the importance of those objects to the reader. The design on the left has problems with the sizes of items relative to their importance. The nameplate overpowers the headline for the major story, as does the thick rule under the headline. The headline and picture for the major story are far too small for their importance. The size of the headline, the dividing rule, and the picture for the minor story are too large, giving it the appearance of prominence on the page. On the right, however, these items are put into proper proportion relative to their importance in content and relative to the all the other items on the page.

Balance

Readers like order and stability. Much of human activity is centered on creating order and eliminating chaos and confusion. In design, the feeling of order and stability is created when the elements on the page are placed with a sense of being at rest where they are positioned. The desire for this equilibrium can be clearly seen in the natural tendency people have to center titles, pictures, and so forth on a page. It just feels right. You must remember the reader's desire for balance when you design your documents.

There are two very interesting and somewhat surprising factors to consider when you attempt to balance a page. The first is that the visual center of a page is not at the mathematical center of a page. The visual center is higher. It is located at the golden mean. You can find the visual center by dividing the vertical length of the page by 1.618 and measuring that distance up from the bottom. Another method for finding the visual center

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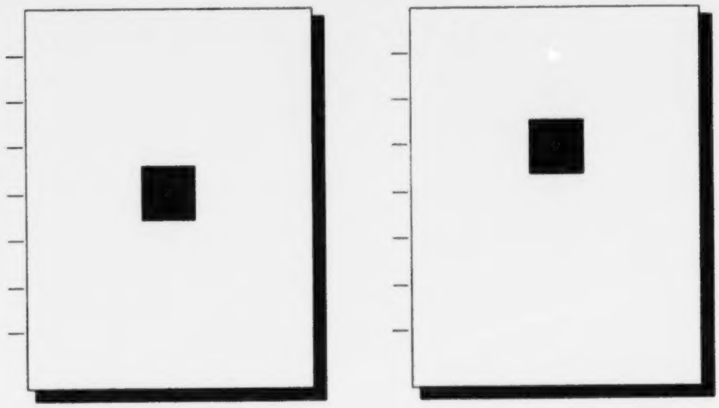
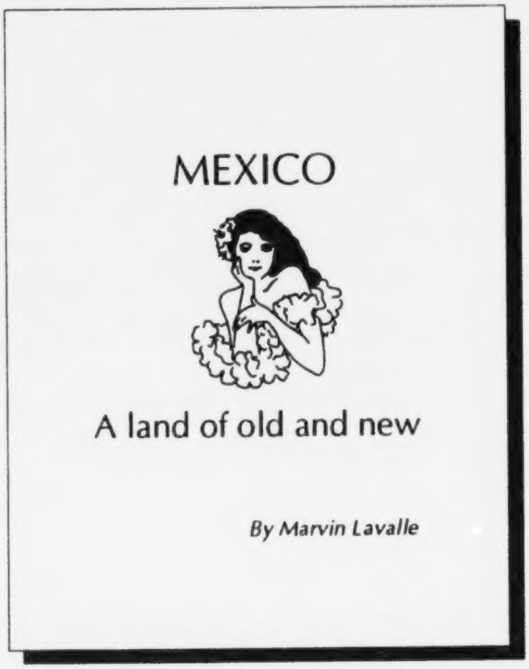
is to divide the page vertically into 8 equal sections. The visual center is located by counting down 3/8's from the top of the page. Placing a dominant object at the visual center of the page will create a design with a feeling of stability.



When an object is placed at the mathematical center of the page it appears to be too low. But when the same object is placed at the visual center, it appears to be more stable.



MEXICO

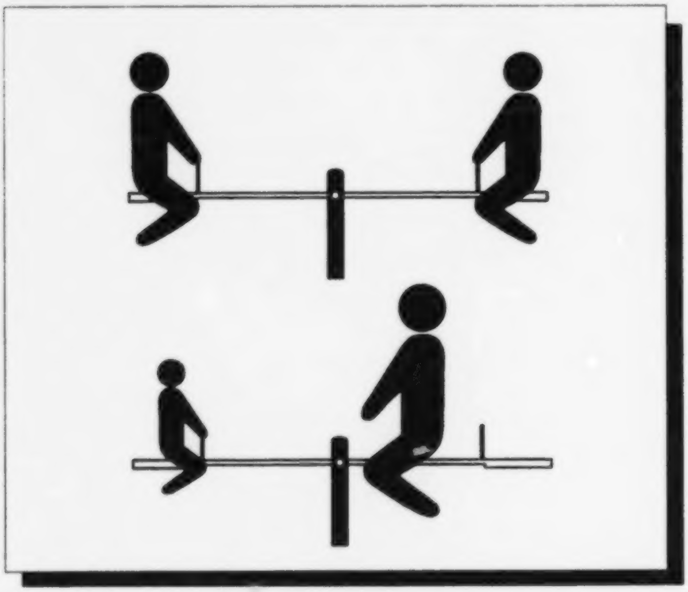
A land of old and new

By Marvin Lavalle

When a page will contain a single dominant object, placing that object at the visual center gives the page a stable and pleasing look. In this case, the eyes of the girl are placed at the visual center because the reader will look at the eyes first.

There is a second and more important factor to consider when balancing a design. It is that this natural desire for balance is one of the main reasons novice designers produce many poor designs. If the placement of items on a page is perfectly balanced by centering, the design will have no tension. It will not arouse curiosity in the reader. This perfect balance will not, in most cases, be very interesting. It may be acceptable for the annual report of a banking institution, but for most of the documents you will produce, it will result in a lifeless design.

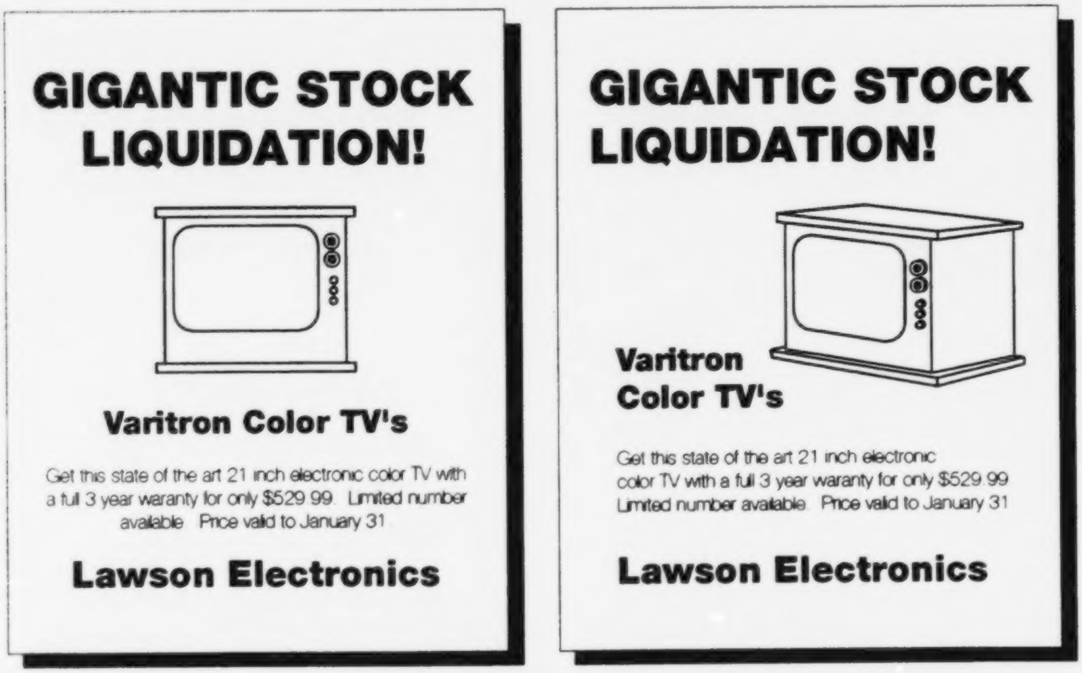
Balancing a page has often been compared to balancing two people on a teeter totter. If the two people are exactly the same weight they can sit at either end of the teeter totter and balance perfectly. A person watching these two balancing would not be too surprised to see this occurring because they are exactly the same weight and sitting exactly the same distance from the center. But perfect balance can also be achieved with two people of unequal weight by having the heavier one sit closer to the middle while the lighter one sits further away from the middle. Unlike the first scenario with people of equal weights, a person watching these two would be much more surprised that balance has been achieved, especially if one person weighed considerably more than the other.



Formal and informal balance. Both teeter totters balance but the one on the bottom, which is informally balanced, generates more interest and arouses more curiosity.

Something is not logical, but yet there it is, they balance. The curiosity aroused by the tension between the weights of the two people and their positions results in far more interest in this balancing act than the two people of equal weight. The two types of balancing just described are found in graphic design. They are known as formal and informal balance. Let's examine them in greater detail.

Formal balance Formal balance is also known as symmetrical or static balance. This is the kind of balance created on the teeter totter when you have two people of equal weight. It is achieved in design when one side of a page mirrors the other or the top half of the page mirrors the bottom half. All objects will appear stable and at rest. This type of balance results from the natural desire to center objects and creates feelings of peace and stability. Formally balanced designs are conservative. They can also be stagnant and dull, especially if the content of the message to be conveyed is exciting and full of life. As with all of the principles of design, you must consider what message is being conveyed by the attributes of the page items and ensure that it is consistent with the message of the written content.



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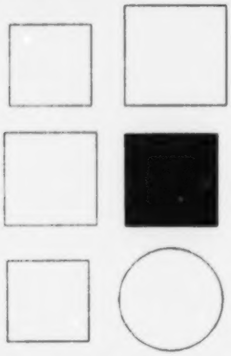
Formal vs. Informal balance. Each design contains the same items. Notice that the formally balanced page is static while the informally balanced page is more interesting and dynamic.

Informal balance

Informal balance is also known as asymmetrical or dynamic balance. It is achieved in the same way that the teeter totter was balanced with people of different weights. Larger, heavier objects must be placed nearer the center of the page and smaller, lighter objects must be placed further away from the center to maintain the balance. Informal balance creates visual tension and arouses curiosity in the reader. This creates a feeling of excitement, surprise, energy, and life in designs. Informal balance is best suited for the majority of the documents that you will produce.

Achieving informal balance is more complicated than achieving formal balance. There are three additional factors to consider when determining the weight of an object for informal balance: the size, the shade of lightness/darkness, and the color of the object. Larger objects usually have more weight than smaller ones. But a dark shade and a certain color can make smaller

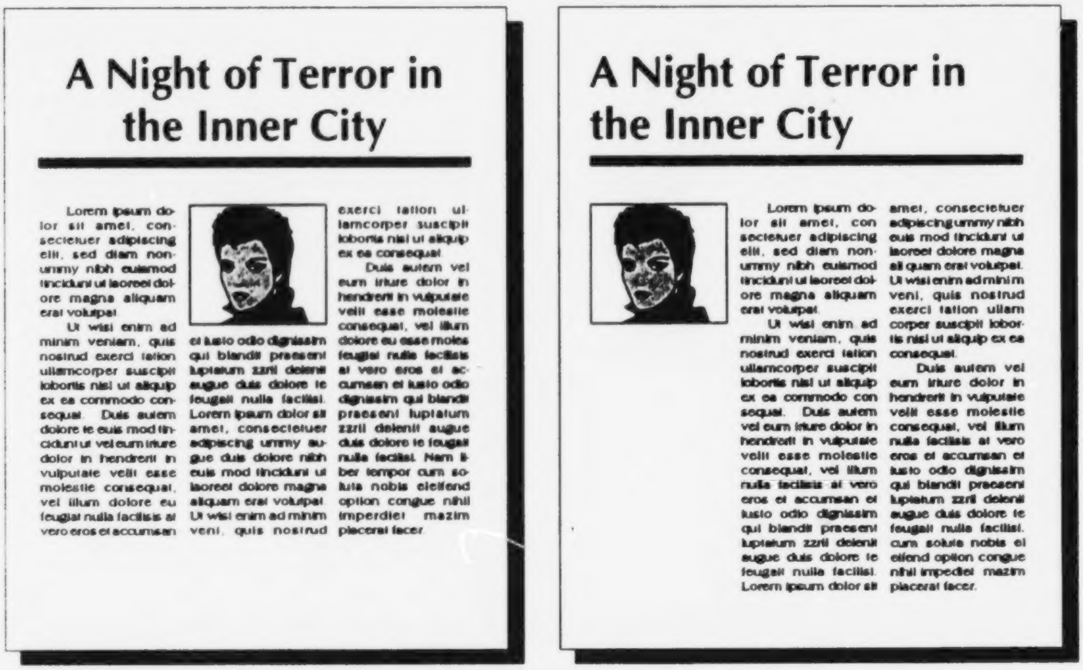


Visual weight is dependent on size and shade. Large objects have more weight than smaller ones. Dark objects appear to weigh more than light objects of equal size. Circular objects appear heavier than rectangular objects of equal area.

objects have more weight than much larger ones. Generally, cool colors have more weight than warm colors, but the shade must also be considered. Dark objects have more weight than light objects.

Unfortunately, there is no mathematical formula for determining informal balance. The interaction of size, shape, and color forces you to assess the weight of items subjectively. Experiment with the placement of page items until a feeling of balance is achieved.

Formal balance conveys a stable, conservative feeling to documents. It can be used for formal invitations, legal documents, and certain articles and reports. Formal balance is also excellent for adding organization to publications that contain a series of items, such as catalogues and product information brochures. It must be remembered, however, that formal balance is the easiest to achieve and is, therefore, used widely by novice designers. For this reason it is recommended that you force yourself to balance designs informally.



A Night of Terror in the Inner City

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A Night of Terror in the Inner City

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The way that a design is balanced can greatly add to the communication of a message. Here are two designs for the same magazine article. Both contain the same elements and exactly the same amount of body text. The only difference is way the page is balanced. Which one makes the picture look safe and comfortable? Which one makes the picture look exposed and vulnerable, like the content of the article? You can see that the dynamic feel of the informal balance on the right is far more suited to the content of the article than the static feel of the formal balance on the left.

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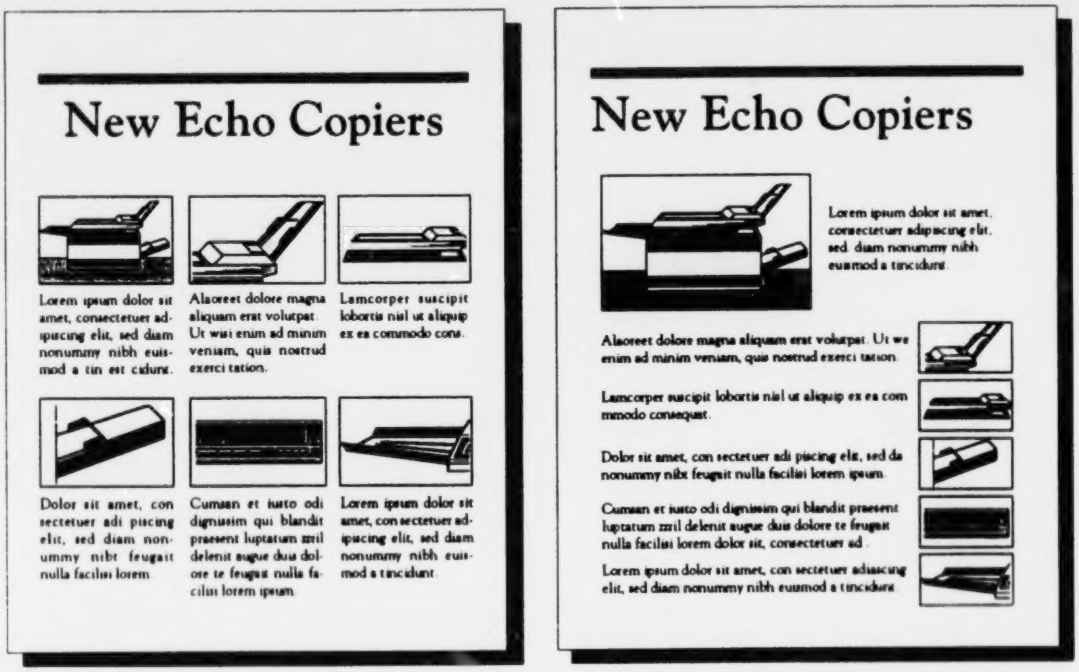

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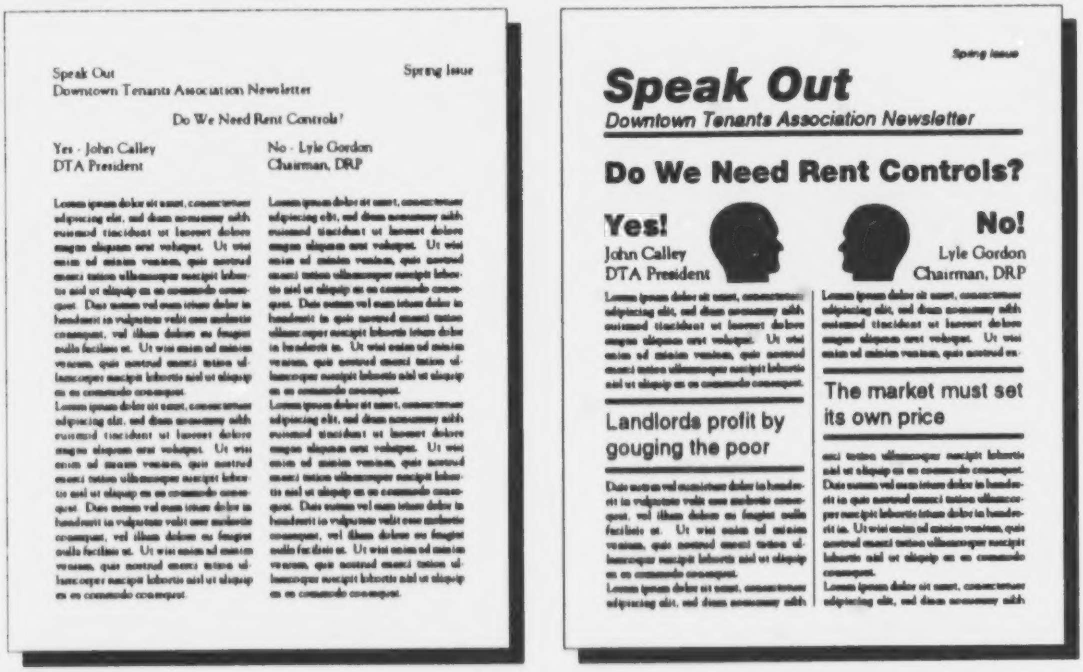
Consider the effect of the balance in these two designs. The formally balanced page on the left has an orderly, organized look that is ideal for a catalogue. The informally balanced page on the right highlights one particular graphic and caption, and it has a more upbeat look that is better suited for promotional purposes.

Informal balance conveys a feeling of action and life. It is well suited for a wide range of documents, most of the documents you will produce, in fact. Even though it is harder to achieve informal balance, it is more desirable than formal balance. Try to move away from formally balanced designs as you progress in your experience with page design.

Contrast

A common problem with many publications is a dull gray appearance that fails to catch the reader's eye because nothing stands out. The reader is apt to skip the page simply because the important points are not highlighted for easy access. Another common problem with many publications is a monotonous look to long passages of text. Like listening to a lecturer who speaks in a monotone, reading long unbroken passages of text can be very tedious.

In both cases what is missing is contrast. Contrast between the objects on a page breaks monotony, adds emphasis to important items, and creates the variety needed for visual interest. Providing such variety does the same thing to a page that spice does to food: it gives the page life!



Speak Out
Downtown Tenants Association Newsletter
Spring Issue

Do We Need Rent Controls?

Yes - John Calley
DTA President

No - Lyle Gordon
Chairman, DRP

Spring Issue

Speak Out
Downtown Tenants Association Newsletter

Do We Need Rent Controls?

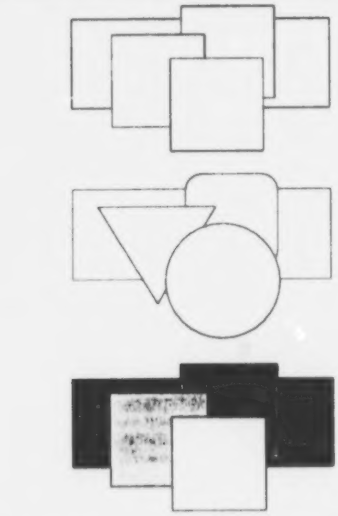
Yes!
John Calley
DTA President

No!
Lyle Gordon
Chairman, DRP

Landlords profit by gouging the poor

The market must set its own price

The newsletter on the left suffers from one of the most common afflictions in design: it lacks contrast. The contrast in the second newsletter gives it more visual interest and adds emphasis to items of importance. Notice that this much needed contrast is achieved in several ways.



You can create visual interest in your designs by using contrasting shapes and shades. Notice that the contrasting shapes and shades are more interesting to look at than the top set of rectangles.

The are two main ways to provide contrast. The first is by varying the type that is used for the text of the document. You will learn a lot more about type in the next chapter, but a few general points regarding typographic contrast can be made here. One way of varying type is by using two different families of type faces. One common example is to use Helvetica type for the titles, headlines, and subheads and to use Times Roman type for the body text. The shapes of these two type faces are quite different, and the resulting contrast is effective in breaking the body text into small manageable chunks and for highlighting the important points contained in the titles, and so forth. Color can also be used to add emphasis and contrast for titles, and the size of type can be varied. Larger text is effective for titles, headlines, and subheads. The type used for the body text of a document can also be varied to emphasize certain points by setting it in bold, italic, or underlined characters.

A second method for providing contrast to your documents is to incorporate graphical objects into your designs. Diagrams, illustrations, photographs, lines, borders, and so on. provide the reader's eye with a break from the work of reading text. To provide maximum contrast when using graphics on the page,

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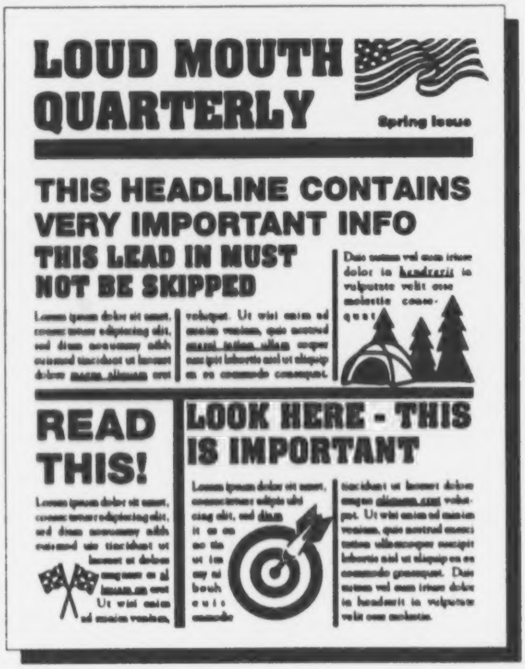
you must consider the size, shape, shade, and color of the various page items. Blocks of text are usually rectangular. A round or irregularly shaped graphic can be very effective for creating visual contrast. Strong black/white contrast can be achieved with bold lines (called rules) under or over titles. Using warm colors for certain items and placing them along side items with cool colors can also be used to provide contrast on a page.

However, contrast can be overused. The lecturer who speaks in a monotone needs to vary the volume and tone in his voice to effectively hold his audience's attention and add emphasis to important points. But raising his voice must be done judiciously. While he may get his listener's attention initially by shouting at them, it will lose its impact if he does it too often. Furthermore, if he shouts continually, the presentation may be too hard to take, even though the content may be very interesting. Providing too much contrast on a page is like shouting at your readers too often. It's hard to bear! A page with too much contrast can be hard on the eyes. Too much contrast can also result in too many items competing for the reader's attention. So, like using powerful spices in cooking, use contrast sparingly to add life to your documents.

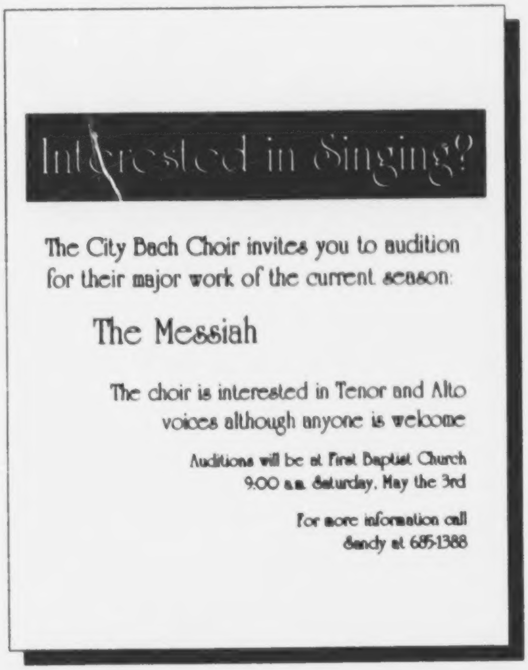
This design has too much contrast; too many items want your attention all at the same time. The design appears to shout at you everywhere you look. Like a poorly tuned radio, too much contrast produces "visual static" that confuses the reader and hinders communication.


LOUD MOUTH QUARTERLY
Spring Issue
THIS HEADLINE CONTAINS VERY IMPORTANT INFO
THIS LEAD IN MUST NOT BE SKIPPED
READ THIS!
LOOK HERE - THIS IS IMPORTANT

Rhythm

Take a look at the design below. Notice that there is an irresistible flow down to the lower right of the page. The design draws your eyes to the specific details of the message that is to be communicated. In terms of the principles of graphic design, this page has good rhythm.

This design causes the reader's eyes to move to the specific details of the message. It has good rhythm.



Interested in Singing?

The City Bach Choir invites you to audition
for their major work of the current season:

The Messiah

The choir is interested in Tenor and Alto
voices although anyone is welcome

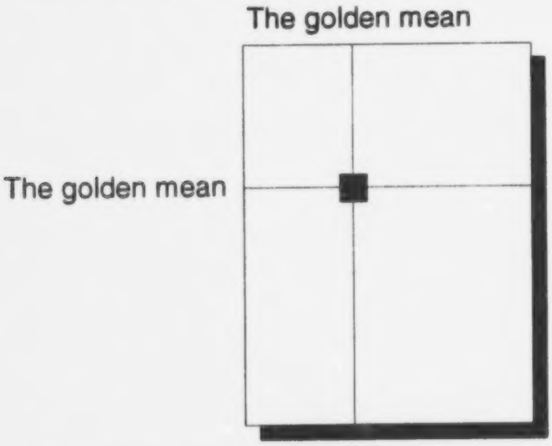
Auditions will be at First Baptist Church
9:00 a.m. Saturday, May the 3rd

For more information call
Sandy at 685-1388

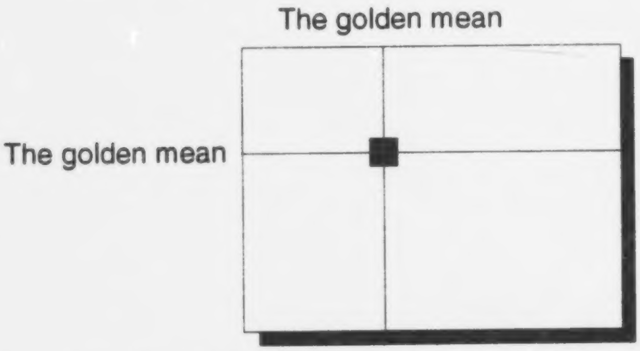
The rhythm of a design is how the placement of page items causes the reader's eye to move across, down, and/or around the page. Directing the eye around the page is a critical factor in the development of good designs because the eye is the gateway to the reader's mind. Good designs lead the eye through the material on a page with an underlying, invisible road map. This road map can greatly enhance the message of a document, or it can actually lead the reader's eye away from important content. Understanding how the reader's eye moves on a page and what can affect that movement is critical for developing good rhythm in your designs.

The true visual center of the page

In the discussion of balance, you learned that the visual center of the page was not located at the mathematical center, but instead is found higher up the page at the golden mean. This was not the complete picture. Research has determined that when a reader encounters a new page, whether the page is tall or turned on its side, the eyes naturally gravitate to the left of the page along the golden mean line. Amazingly, the spot where the eyes go first is at the intersection of the two golden mean lines, as illustrated below.



The true visual center of the page is located higher and to the left of the mathematical mean. It can be found by dividing both the length and the width of the page at the golden mean.

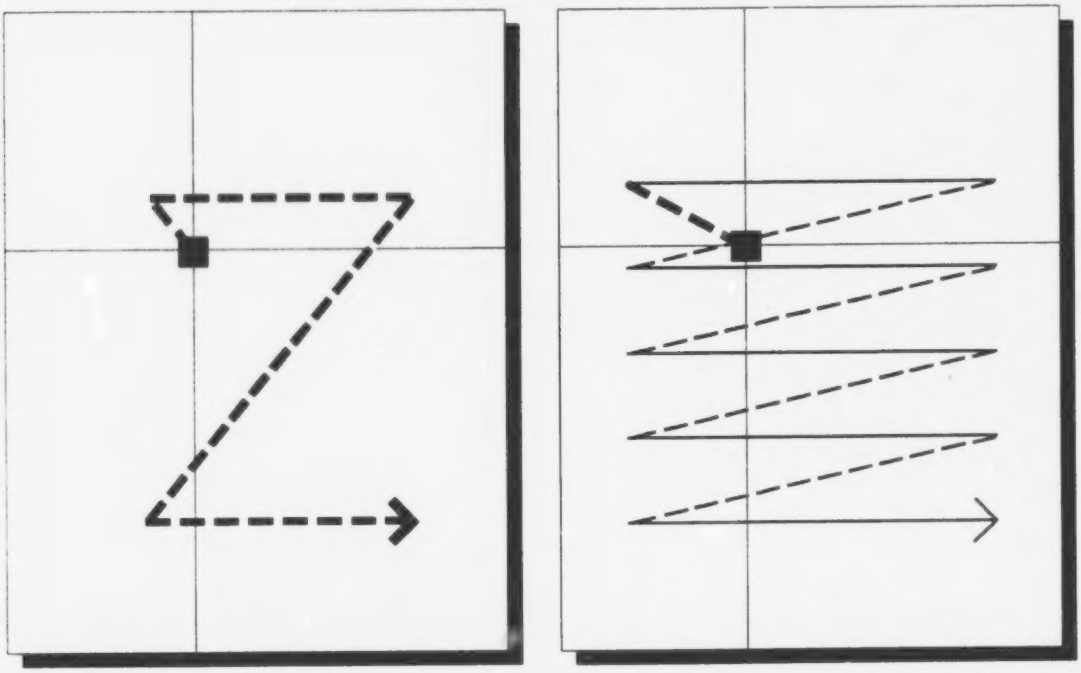


Even when the page is oriented so that it is wider than it is tall, the eyes will focus on the upper left where the two golden mean lines intersect.

Scanning patterns

Once the eyes have gone to the page's visual center they invariably survey the page before any serious reading takes place. This is the Scan step of reading, and designs must generate interest during this two- to ten-second perusal of the page. Research has discovered that there are two basic scanning patterns that the eyes will follow when a neutral page is encountered. A neutral page is not a blank page. It simply contains no major items that attract the eye away from its natural path. The reader will focus first on the visual center of the page. From there the scanning pattern that is used depends on the amount of text and the number of items on the page. If there is little text and only a few items, then the eyes will scan a large open Z-pattern on the page. If there is a lot of text, the eyes will scan a tight Z-pattern several times down the page.

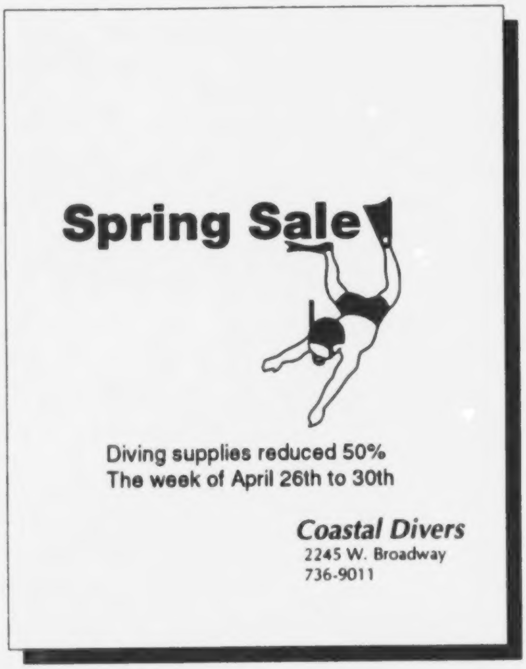
The text alters the scanning pattern because readers are conditioned to start at the beginning of the text and to read across the page from left to right and down with a return sweep at the end of each line of text.



The two natural scanning patterns that a reader's eyes follow when a neutral page is encountered. The pattern that is followed is determined by the amount of text on the page. Little text will result in the open Z-scan on the left. A lot of text will result in the tight Z-scan on the right.

Many designers capitalize on this natural scanning behavior when they put their pages together. The items on the page are arranged to form a Z-pattern that the eye can follow easily. Because it is so easy for the reader to follow this pattern, the message of the document is readily absorbed by the reader's mind, even if the reader is not particularly interested in the content. For this reason, the Z-scan is often incorporated into promotional material so that an important message can be conveyed to a reader with a minimum of effort. Take a look at the advertisements in a magazine and find the basic road map that directs the eye. Many times the major items will form a Z-pattern to support the Scan step of reading with the details of the message being read during the second and third passes over the page. The beauty of this design is that even if the reader is busy, the page can deliver a message entirely during the Scan step before the reader turns the page.

Many designs capitalize on the natural Z-scan of the eyes. Here a high contrast item is placed at the visual center. From there the items form a Z-pattern that the eyes follow easily.



Spring Sale

Diving supplies reduced 50%
The week of April 26th to 30th

Coastal Divers
2245 W. Broadway
736-9011

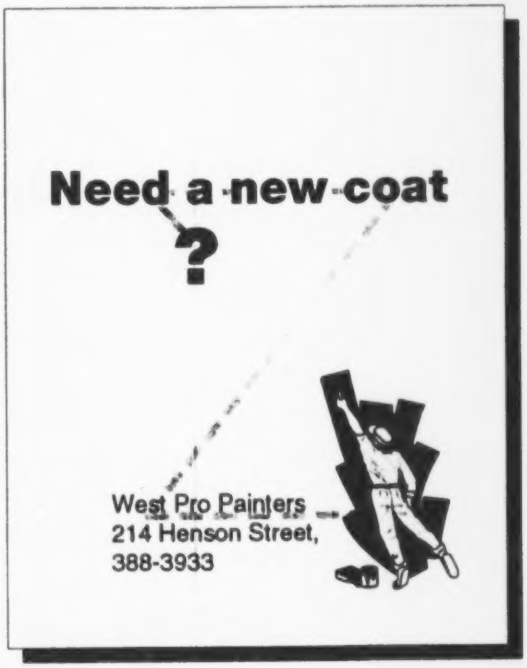
The terminal area

The scanning behavior of readers and the three-step reading process lead to the concept of the terminal area on the page. The terminal area, located in the lower right corner, is where the eyes end up when a reader finishes both the Scan and Skim steps of reading. You must carefully consider how you use this part of the page because it is here that most readers make the decision to continue reading or not. Important graphics, often pointing back up the page, are frequently placed in the terminal area to maintain reader interest. The terminal area is also used for coupons, mailers, or anything where the reader must take an action as a result of the content of the page.

Placing an important item in the terminal area acts as a barrier to keep the reader's eye from running off the page. Often a graphic in the terminal area directs the reader back to the visual center where the eye started its scan. This results in a natural figure 8 movement of the eye that draws the reader into the Skim and Scour steps of reading.

Where the eye lingers

Rhythm in design pertains to eye movement. It is important that you understand the way the eyes naturally scan the page so you can design to support this behavior. It is also important that you know where the eyes linger on the page. If one area is preferred over another, it would be an ideal location for placing eye-catching graphics or the important details of the message to be communicated.



Need a new coat ?

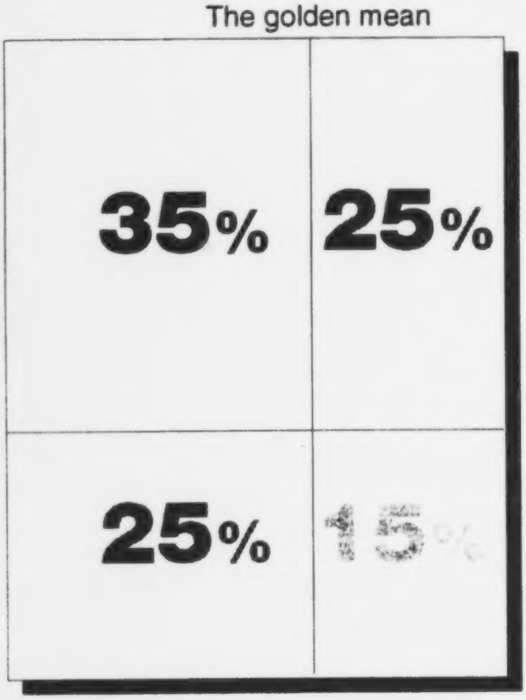
West Pro Painters
214 Henson Street,
388-3933

The natural scanning behavior of the eyes and the three-step reading process lead to the importance of the terminal area on the page. By placing an interesting graphic here, you can keep the reader focused on the page and facilitate the next step of reading. A strong item in the terminal area keeps the eye from running off the page. Notice that by directing the eye back to the visual center, your eye tends to run in a figure 8 pattern and you are encouraged to review the page for more detail.

Research has determined that readers prefer certain parts of the page. You can divide a page into four sections by drawing a vertical line at the golden mean measured from the left side of the page and drawing a horizontal line at the golden mean measured from the top of the page, as illustrated on the following page. The large section in the upper left contains the visual center of the page and is usually the first area to be scanned. Readers spend approximately 35% of the time in this section. When combined with the section in the upper right, you can see that readers naturally tend to prefer the upper part of the page and spend approximately 60% of the time there.

This information is very useful to the publisher. While it is possible to get readers to dwell on some other part of the page, the upper 5/8th's of the page is naturally preferred by your readers. This is an excellent location for major items. Take a look at the advertisements in a magazine. You will find that the majority of them capitalize on the reader's preference for the top part of the page.

You will also notice that the readers spend only 15% of the time in the terminal area of the page. Don't be mislead by this figure. The terminal area remains an important part of a design. It can redirect the reader back to the beginning of the design. The terminal area is also an excellent place to provide critical details of the message or outline the specific action that is



The reader will focus on the upper left more than any other part of the page. Most designs place major items in this section of the page.

desired because, although the reader does not spend most of the time here, the terminal area is the beneficiary of the work done in the rest of the design.

Five ways to create rhythm

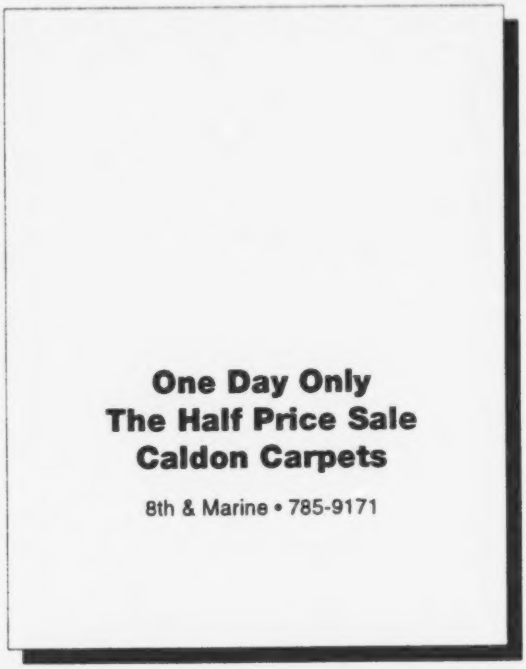
There are many ways to get the eyes to move across a page. Designs can easily force the eyes to follow patterns other than the two natural Z-scans discussed earlier. No matter what scanning pattern is used, it is important that you consider how the reader's eyes will move through your design and how you can assist that movement.

Here are five ways to create eye movement in your documents. Use these techniques to provide a road map for the eyes and to avoid creating visual roadblocks that prevent the reader from easily accessing the content of your publications.

- **Contrast**
  The eye is naturally drawn to contrasting elements on the page. High black/white contrast, type that is much larger than the rest of the text on the page, graphical objects with different shapes and shades than the rest of the items on the page will all attract the eye. Always remember the role of white space when trying to create the contrast needed to draw the eye to a contrasting item on the page. Make sure to surround the contrasting item with enough open space so that the reader's eyes can pick out the item easily.

- **White space**

  The eye does not rest on white space. When white space is encountered the reader's eyes will continue to scan until an object is found. This behavior can be used very effectively to force the eye to a certain part of the page. Take a look at the advertisement below. The white space compels the eyes to the text. In this case, the technique has been used to deliver a message to a resistant audience. The white space directs the eye to the message and the reader will take in the content before a conscious decision not to read this ad can be made.



One Day Only
The Half Price Sale
Caldon Carpets

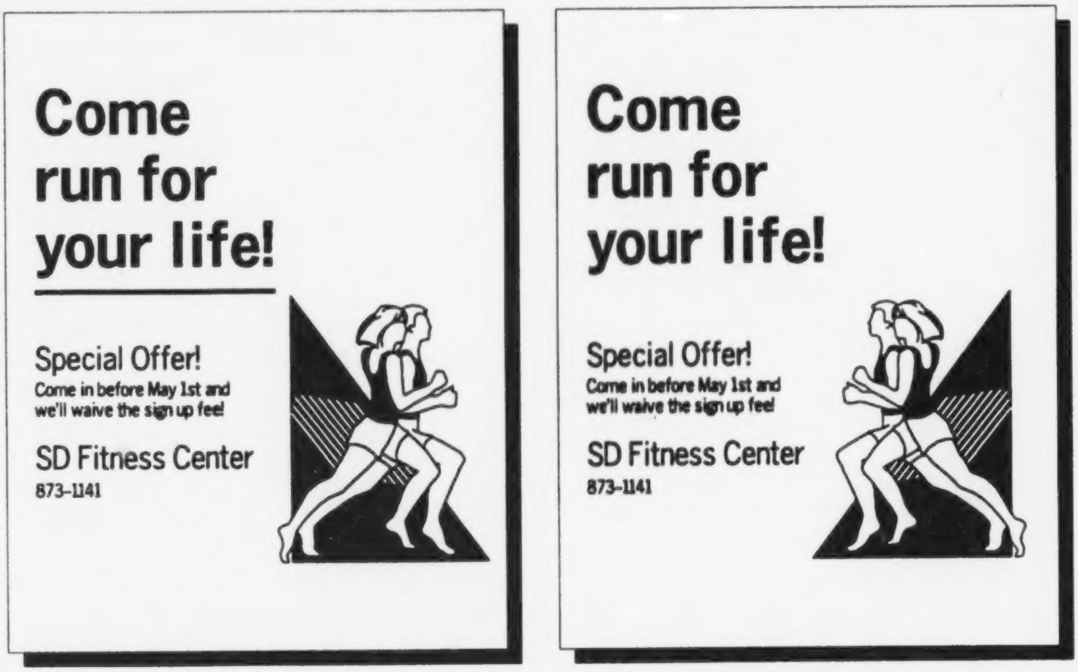
8th & Marine • 785-9171

You can make someone look at something even if they are not interested in the message. Here the design makes strong use of white space to force the reader's eyes down to the text. This design has delivered its message before the reader has a chance to decide not to read the content.

- **Lines**

  All your life you have been trained to follow lines and not to cross them. This training, plus the eye's natural tendency to follow graphic lines, gives lines considerable power to direct the movement of the eye. Readers will follow straight lines more readily than curved ones, although gentle curves will draw the eye effectively. Sometimes, use of lines to direct the reader is very blatant. Many designs use prominent bold lines, often with arrows on the end, to draw the reader to a particular place on the page.

  Like all powerful agents, using lines to direct the reader must be done with care. It is quite possible to unwittingly direct the reader away from the very message that you set out to communicate. The power of lines to create rhythm and the problems that lines can create can be seen in the designs that follow.



Come run for your life!

Special Offer!
Come in before May 1st and we'll waive the sign up fee!

SD Fitness Center
873-1141

Come run for your life!

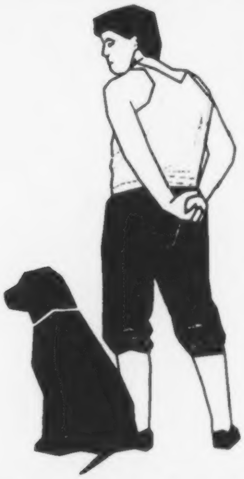
Special Offer!
Come in before May 1st and we'll waive the sign up fee!

SD Fitness Center
873-1141

Which design uses the lines to direct the reader into important content? The page on the left, compels your eyes to follow the horizontal line over to the diagonal line of the black triangle, down to the runners, and off the page. This results in a "dead spot" in the lower left. The page on the right, however, uses the diagonal line in the graphic to keep the eyes on the page and direct you back to the specific details of the ad.

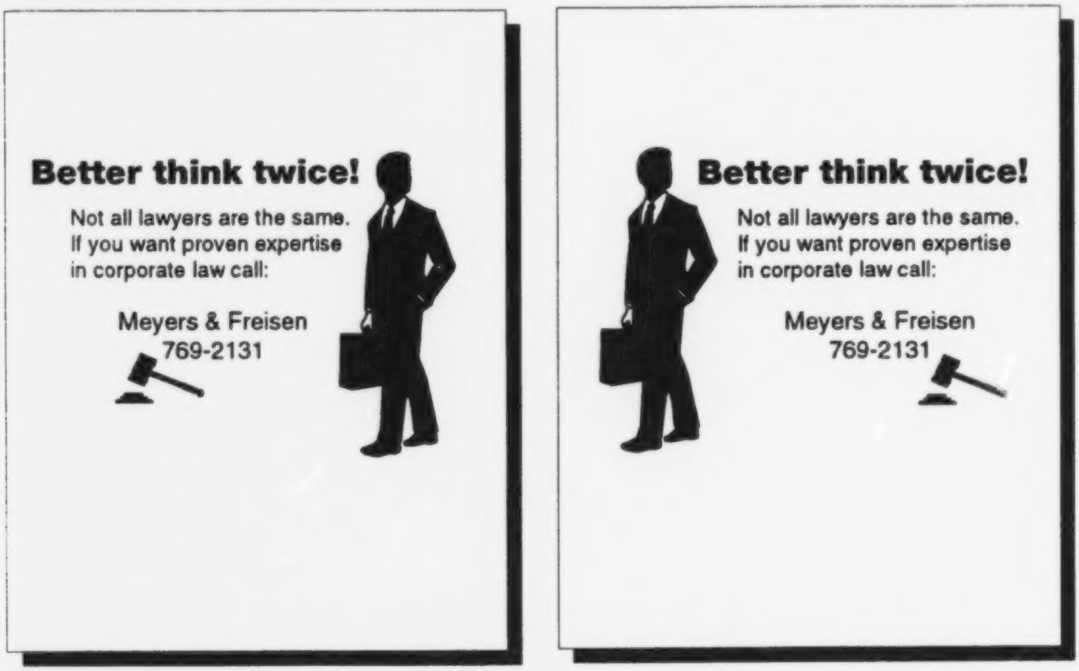
- **The power of eyes**

  A person's eyes in an illustration or photograph are one of the most powerful way to direct a reader's eyes. A person looking at something compels the reader to do the same. Just look at the graphic in the margin to the left. Your eyes naturally follow the direction of the person's gaze because you want to see what the person is looking at.



Where do you want to look when you see this picture?

For this reason you must place pictures of people with great care. You must consider how the gaze of the people in your graphics and photographs will direct the reader through your design. The eyes in such elements can greatly enhance the rhythm of the page. But they can also direct the reader away from important information. Examine the following two designs. They contain exactly the same items. The only difference is the placement. Notice the power of the man's look. As was the case with lines, eyes can also create "dead spots" in a design. The placement of the items on the page simply directs the reader's eyes around or away from some part of the design. This can be clearly seen in the following design on the left, where the man's eyes direct the reader right off the page.


Better think twice!
Not all lawyers are the same.
If you want proven expertise
in corporate law call:
Meyers & Freisen
769-2131
Better think twice!
Not all lawyers are the same.
If you want proven expertise
in corporate law call:
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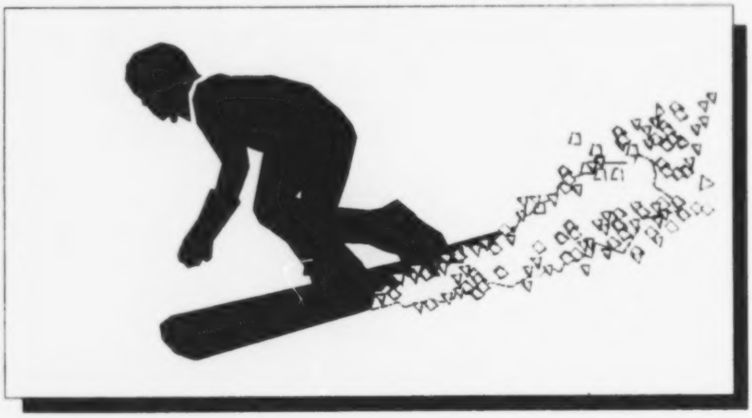
769-2131

Notice the power of the eyes in these designs. The man's glance directs the reader off the page on the left and most of the message may be unread. On the right, however, the design capitalizes on the direction of the man's glance, and it makes the reader read the message.

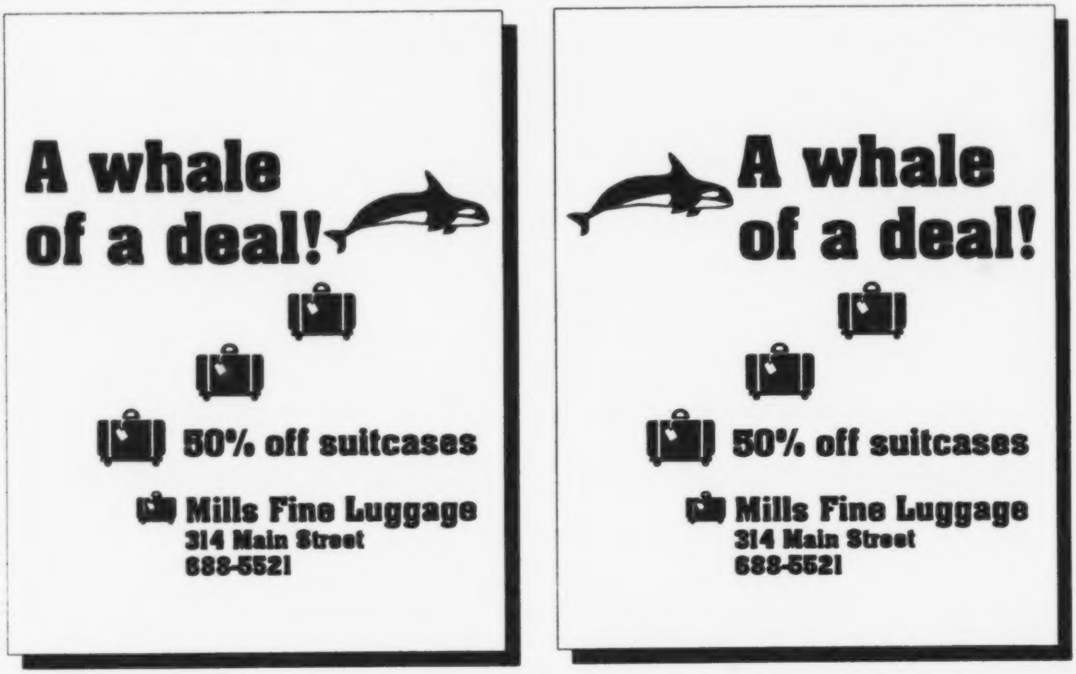
- **Apparent motion**

  Printed graphics capture a single moment in time. Graphics that depict someone or something actively involved in an endeavor often have apparent motion. Apparent motion is the direction and speed that is implied by the graphic. A person walking, or riding a bike, or skiing, or an airplane flying, or a race car racing around a track all have apparent motion.

Here is a good example of apparent motion. The graphic has frozen the action, but the eyes will still follow the path that the snowboarder will take.



Apparent motion has a profound effect on the reader's eye in a publication. The mind perceives the direction of motion implied in the graphic and follows along that path. Not only will this occur with complete pictures, but the mind will also fill in the missing details in partial graphics and still perceive the apparent motion. For example, the mind will create a feeling of motion from a picture of a man sitting on a car seat holding a steering wheel in his hands.


A whale
of a deal!
50% off suitcases
Mills Fine Luggage
314 Main Street
688-5521
A whale
of a deal!
50% off suitcases
Mills Fine Luggage
314 Main Street
688-5521

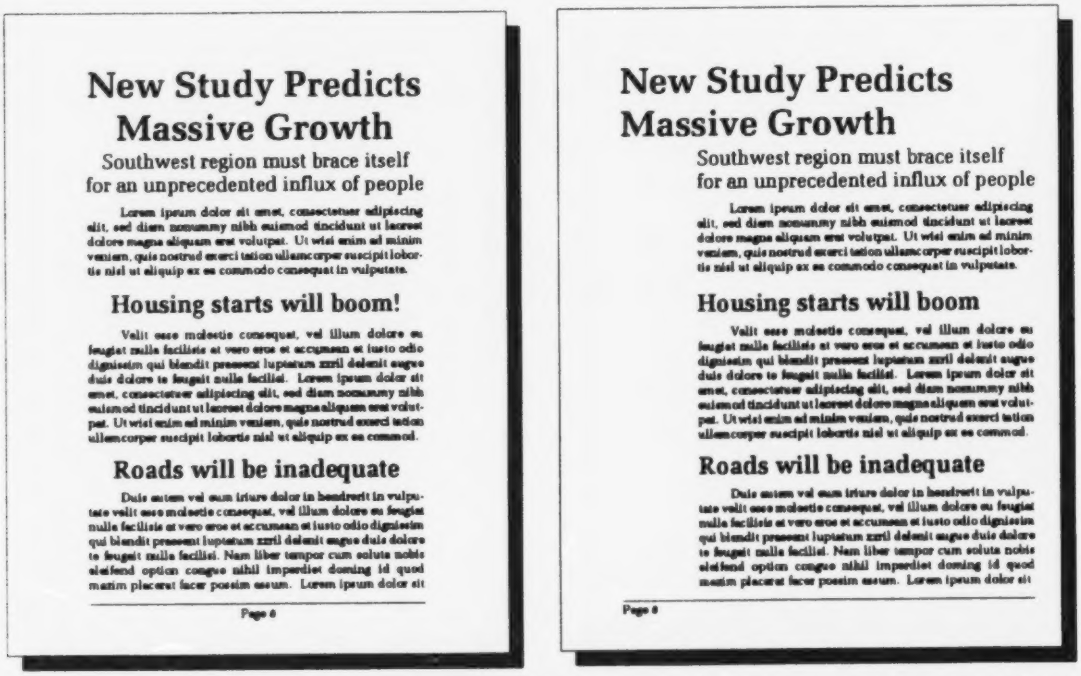
Examine the effect of the apparent motion of the whale in these designs. Both pages are designed to capitalize on the visual center of the page and the natural Z-scan. But the design on the left short circuits the Z-scan with the implied motion of the whale, and the eye is led off the page. The design on the right incorporates this apparent motion of the whale so that it serves to direct the reader to the message.

You can capitalize on the effect of apparent motion on the reader's eyes to create powerful rhythm in your designs. Place your graphics so that the motion in the picture leads into the document's message. This can be a very effective way to lead the reader into a section of a design. Like the other techniques just discussed, however, you must ensure that the apparent motion of your graphics does not lead the reader away from important items on the page.

White space

People new to design want to overfill the page. This is a very common problem. There is something irresistible about filling a white area on a page. There seems to be a feeling that you are wasting space if some portion of the page is left empty.

You must resist the temptation to treat white space as wasted space. It is not! While white space is not a principle of design per se, it is an important and active agent for supporting the other principles of design we have been discussing. White space is needed to provide the black/white contrast that catches the reader's eye. White space is especially important for making important objects stand out from other items on the page. White space can be used to create rhythm in a design. The reader's eyes can be directed to specific content very effectively with white areas on the page. The white space in the margins defines the proportions of the text blocks in a document. White space has weight and can be used to balance dark objects. It is far from a passive, wasted area that must be eliminated from your designs!



New Study Predicts Massive Growth

Southwest region must brace itself for an unprecedented influx of people

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Housing starts will boom!

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Roads will be inadequate

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Page 6

New Study Predicts Massive Growth

Southwest region must brace itself for an unprecedented influx of people

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Page 6

White space is a powerful agent in design. Compare these two pages. The white space on the page on the left is simply leftover random filler. But the white space on the page on the right is a planned graphical object. It gives the design dynamic balance and creates rhythm down the page. The contrast between the white space and the type adds life to the page.

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Some designers have gone as far as suggesting that white space should be limited to only one or two clearly defined places on the page. This is not a rule etched in stone, but the point these designers are making is a good one. White space should not occur haphazardly around the page in some random pattern. Instead, white space should be a planned component in design for a page. It has been said that good designers are known by the white space they leave behind!

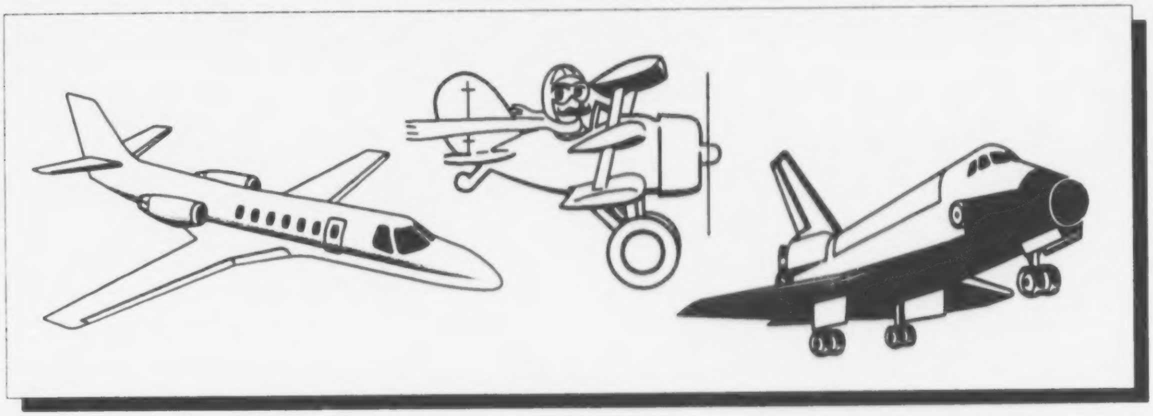
Unity

Unity deals with the overall impact of all of the various page items. In other words, after creating, sizing, and placing the text and graphics for a page, does your design actually do what it was intended to do? Unity is divided into four main categories. Each aspect should be considered when assessing the degree of unity in any particular design. These categories are the thematic unity, the tonal unity, the visual unity, and the typographical unity of the design.

- **Thematic unity**
  Thematic unity, also known as topical unity, is achieved when all of the items on the page are related to the theme or topic of the message being communicated by the document. If you are designing a brochure for a new line of pleasure boats, the items in your design must all relate to a nautical theme. A photograph of a tiger, no matter how striking, would not be consistent with the publication's theme and should not be used. Using such an item would only confuse the reader and detract from the brochure's purpose. Make sure that every item on the page relates to a clearly defined theme or topic to ensure continuity throughout the design.

- **Tonal unity**
  Tonal unity is also known as stylistic unity. It is achieved when all of the items on a page are consistent in style and tone so that they convey the same "look" and "feel" to the reader. This aspect of unity is more subtle than thematic unity, but it can create as much or more confusion. An advertisement for a new high tech car with aerodynamic styling would call for a design that was exciting and futuristic. Using an Old English typeface for a title would be out of place. Again, the reader would be confused and communication would be compromised.

  Problems with tonal unity are common for novice designers, and, in this case, the electronic revolution has not made the task of design any easier. The availability of pre-made clip art for desktop publishers has, in fact, made it much easier to have problems with unity of tone. The scenario goes as follows. The publisher is producing a document that requires a graphic of a racing car, so he or she goes looking through the clip art files to find one. But all that can be found is a picture of a Volkswagon Beetle! Many novice publishers will go ahead and use the graphic anyway, even though its tone does not match the rest of the document. You must resist this temptation. The design will be much more effective if you simply leave this graphic out.

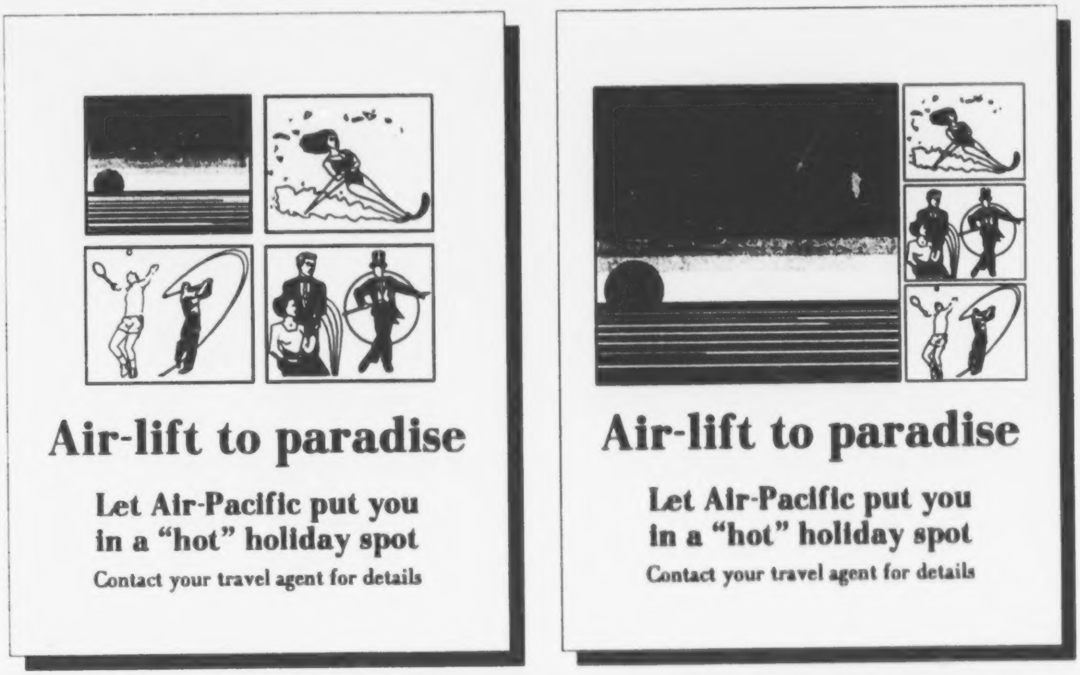


Suppose you had to create a promotional brochure for a world-wide courier company. The essence of the message to be conveyed is that the company currently uses the fastest air travel possible to serve its customers, and in the future, even more startling methods for moving letters and parcels are being considered. If these three graphics appear in the brochure there will be a problem with tonal unity. It is true that all three are thematically related to air travel, but the cartoon biplane is both out of date and out of place with the highly realistic graphics of the jet and space shuttle.

- **Visual unity**

  Visual unity is achieved when the visual relationship of the items on the page is clear and that relationship is consistent with the message being communicated. An important step in achieving visual unity is to build your page around a dominant item. The dominant item gives purpose to the other items on the page. It makes the movement through the design automatic because the reader does not have to pause to determine where to start and what the relationship is between the various page elements. The dominant item unifies the design. The importance of a dominant item on the page can be seen in the following designs.

  Visual unity also involves the concept of economy in the design. To be visually unified, a design must be economical in content and eye movement. The design may have good rhythm, but economy of eye movement and economy of content may not be preserved. In this regard, visual unity is synonymous with simplicity of design.


Air-lift to paradise
Let Air-Pacific put you in a "hot" holiday spot
Contact your travel agent for details
Air-lift to paradise
Let Air-Pacific put you in a "hot" holiday spot
Contact your travel agent for details

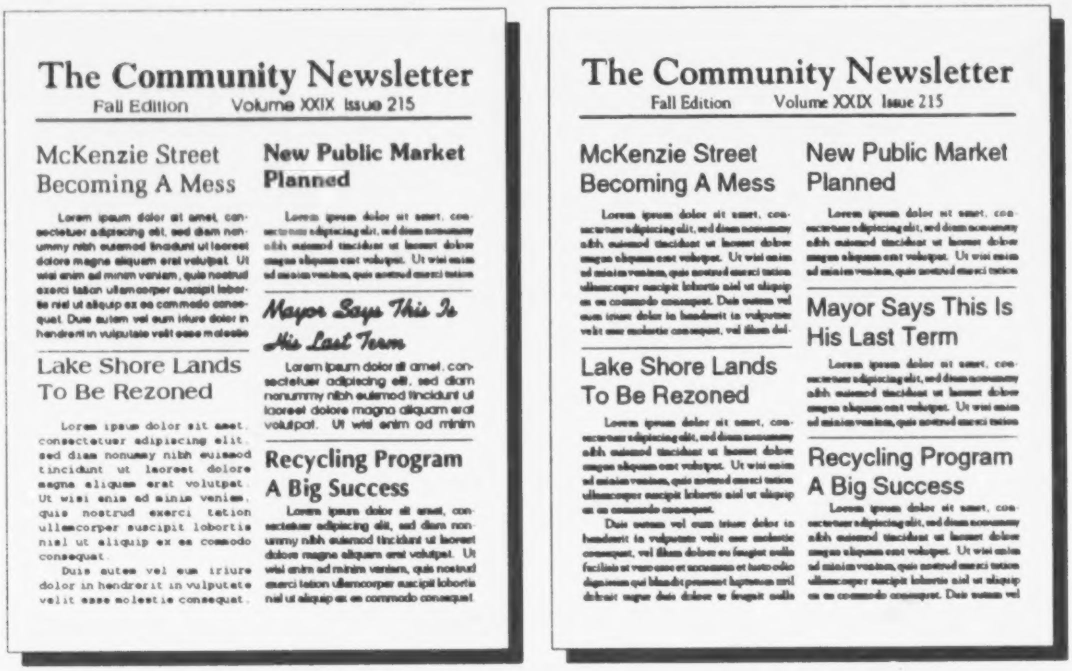
You can quickly see that a dominant item gives purpose to the rest of the items on a page. How the items are related and which one should be examined first is unclear in the design on the left. The dominant item in the design on the right eliminates this confusion.

You must exercise great restraint to achieve the simplicity of design that is the goal of visual unity, especially with the dazzling array of bells and whistles that are at your finger tips in desktop publishing. Just remember that all of those fantastic effects your computer will produce may actually work against the main purpose of your document: to communicate a message. This doesn't mean that you should ignore the effects you can produce with your computer. They can be exceedingly useful in catching the reader's eye. Just exercise self-discipline in not over doing it. If you look at a page, and you see an item that is not absolutely critical for communicating your message, remove it no matter how "neat" it may look.

- **Typographical unity**

  The use of type will be discussed in detail in the next two chapters, but there are two important points that should be made here regarding type and unity. Typographical unity is an extension of tonal unity and visual unity to the type that is used in a document. Regarding tone, typographical unity is achieved when the style of typeface you use conveys a tone that is consistent with the document's message. The shape of the characters gives typefaces a "feel." This feel must be in line with the tone of the message.

Typographical unity is also achieved by using type in a way that promotes visual unity. The type should support the easy movement of the eye across the page. It is all too easy to create a design where the type draws attention to itself and consequently hinders eye movement. One of the most common problems is the use of too many typefaces on one page. This produces the "ransom note effect." When this happens, the reader's eye will slow or stop at each new type face. The page will have a confused and disjointed look. A standard rule of thumb is to use only one or, at most, two families of typeface on a page to achieve a unified design.



The Community Newsletter
Fall Edition Volume XXIX Issue 215

McKenzie Street Becoming A Mess

New Public Market Planned

Mayor Says This Is His Last Term

Lake Shore Lands To Be Rezoned

Recycling Program A Big Success

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Recycling Program A Big Success

The design on the left illustrates one of the most common problems novice publishers have with their documents: too many typefaces on the page. This creates a hodge-podge disjointed look. From the perspective of design, this page has a problem with unity. Notice how the design on the right is more unified by simply reducing the number of type faces to two: one for the headlines and one for the body text.

Assessing a design's unity To assess a design's unity, do not focus on individual items on the page. Instead, stand back from your work and consider the overall impact of the page. As you do, ask yourself the following questions about the design. If the answer to any of them is "no," your design may be lacking unity in one or more areas we have just discussed.

1. Are all of the items on the page related in content to the message to be conveyed?
2. Do all of the items on the page have the same look and feel?
3. Is the page designed around a dominant item?

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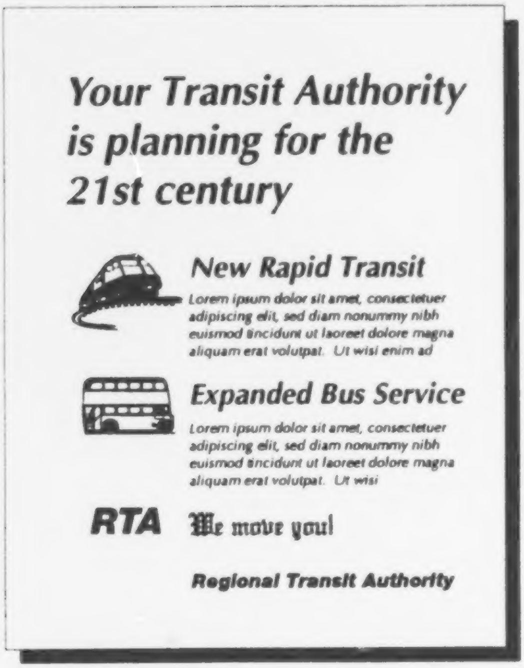
4. Is there a clear and simple path for the eye to follow?
5. Do the typefaces convey a feel that is consistent with the message of the document?
6. Is the type set in only one or two families of typefaces?
7. Is the design as simple as it can be?



Your Transit Authority is planning for the 21st century

New Rapid Transit

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Expanded Bus Service

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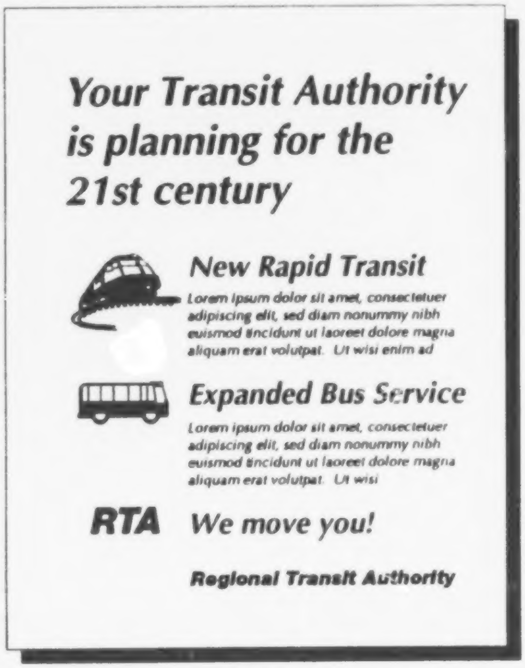
RTA We move you!

Regional Transit Authority



Your Transit Authority is planning for the 21st century

New Rapid Transit

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RTA *We move you!*

Regional Transit Authority

The page on the left has two problems with unity of design. Can you find them? Consider each of the four aspects of unity that you have learned and determine which principles are violated by the page on the left.

Look at the two pages, above. Assess the unity of these designs from the perspective of the four types of unity that have been discussed. The design on the left is visually unified. The large type at the top is the dominant item and there are no unneeded items and the eye is drawn through the material easily. All items revolve around public transportation so the design has thematic unity. The problem with this design is in the tone of the items. While the old double decker bus is used for public transportation, it is not in keeping with the futuristic tone of the rest of the content. Likewise, the Old English script used at the bottom is out of place in a futuristic document. Thus, this design lacks tonal and typographical unity.

The design on the right addresses these problems of unity we have just discussed. You will notice that there is less confusion when a page has unity. Accessing the document's message is much easier.

Practical design

Designing documents is not an easy task. If you have tried it, you have probably found yourself looking at a blank piece of paper or a blank computer screen wondering how an attractive, workable design could ever come together. Don't worry, you're in good company. Every designer in the world has gone through the experience of gazing at a blank piece of paper, waiting for inspiration to come.

The designer's nightmare: the dreaded blank page!

You will learn a number of techniques that can be used to achieve effects consistent with the principles of design in subsequent chapters. This section, however, covers the practical side of design: how to come up with design ideas when you've been staring at that blank piece of paper for an eternity, and you're no further ahead than when you began!

Here are some suggestions for approaching design. Don't skim over them. If you ponder these points and incorporate them into your method for developing designs, the task can be much easier. So consider these suggestions carefully.

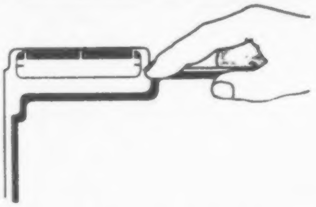
Design is about compromises

You have just learned about the basic principles of graphic design. In a perfect world every page you design would conform to all of the principles at the same time. But the harsh reality is that you don't live in an ideal world, and with most designs it is not possible to satisfy all of the graphic design principles on a single page utilizing the items that must be used. You must make compromises. The way to make these tough design decisions is to go back to the basics.

The priorities for the design decisions must always come from the message to be communicated. If you must make a choice between sacrificing the balance of the design or sacrificing the white space, you must assess which one is the most supportive of the message to be conveyed.

Borrow from the pros

Although great designs may not spring forth daily from most of us, you can incorporate great ideas into your work. If you see an outstanding design, cut it out and keep it in an ideas file. Creative solutions to difficult design problems developed by experienced professionals will provide you with an extremely useful source of inspiration. The work you gather in such an ideas file can be especially useful when you reach a mental block over the design for one of your documents.



Keep a file of good design ideas.

Discipline yourself to experiment

There is an overwhelming temptation to stop growing in your design skills as soon as you create a few attractive and workable designs. The tendency is to reduce design to a formula that will always yield good publications. The problem with this is that if all of your documents have the same look because you are applying a standard design formula, they will lose their impact on your audience.

Experimentation is the key. Discipline yourself to keep trying new ideas in your work. Discipline will be required because it's hard work! You will not be a better desktop publisher by simply reading this book. You must begin applying the concepts and techniques presented here to your designs. The electronic tools available to you provide unparalleled flexibility to modify your design work. Don't get so attached to a particular way of creating your publications that you end up defeating all that flexibility.

Don't turn on the computer right away

Start working with ideas on paper.

You can become too attached to certain items, especially if you made them yourself. The degree of attachment is usually proportional to the amount of time it took you to create the item. You can become too attached to an overall design format for exactly the same reason. To ensure that you maintain a flexible approach to design, you would do well to use a pencil and a piece of paper before creating anything on the computer. But remember that the same pitfall of over attachment also exists when you use a pencil for your designs. You must begin with rough designs. The page items must be sketched in only so that they can be reshaped, erased, moved, and deleted easily. If you spend too much time drawing your design in detail, the pencil version can become just as inflexible as the computer version mentioned above.

A flow of ideas

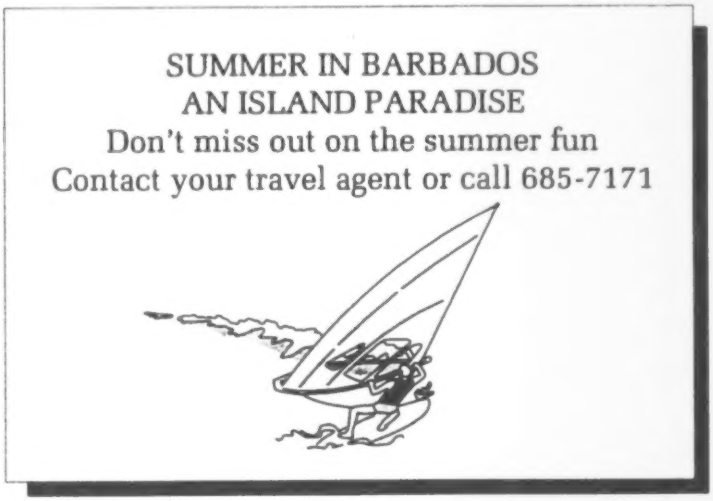
Getting an initial idea is probably the most difficult part of designing a new document. Most people are better at reacting to something than they are at creating something totally new. If you can get something — *anything* — on the page, your natural ability to react will come into play.

Start with small thumbnail sketches for your design. Your initial idea can come from your ideas file, or you can simply start sketching in some very rough page items. Sketch items as shapes and shades. Text should be "lined in" except for very large titles and headlines. It does not matter if the first few attempts are atrocious designs. Once you begin with any idea, good or bad, you will start reacting to what you see. This will cause you to add, move, modify, and/or remove items from the page. If you get a new idea for the design, move on to a new sketch and rough in the new idea. As you get new ideas and refine the existing ones, you will develop a number of rough thumbnail sketches that show a progression of your design ideas. It is this flow of ideas that should be your goal when designing a new document.

After you have sketched a number of rough thumbnails, stand back and look over the designs. If they all have a similar look, then try something completely different. Even if the new idea looks terrible, it will still cause you to react and modify. It is important to develop the ability to recognize when your ideas are looking the same so that you can prevent stagnation in your designs. It is also important to push yourself to try new types of design so that you can continue to grow as a designer.

A practical example

Here is how these techniques can be used to develop design ideas for a project. Assume that you have been contacted by the tourism ministry for Barbados regarding the design of a poster promoting Barbados as a summer vacation destination. As is often the case with this kind of work, you have not been given a completely free hand in the design; there are some constraints. You have been sent some art work that must be included in the design. Furthermore, the poster must be designed around the theme of "missing out on something great if the readers don't act immediately." And of course there are some details that must also appear in the design.

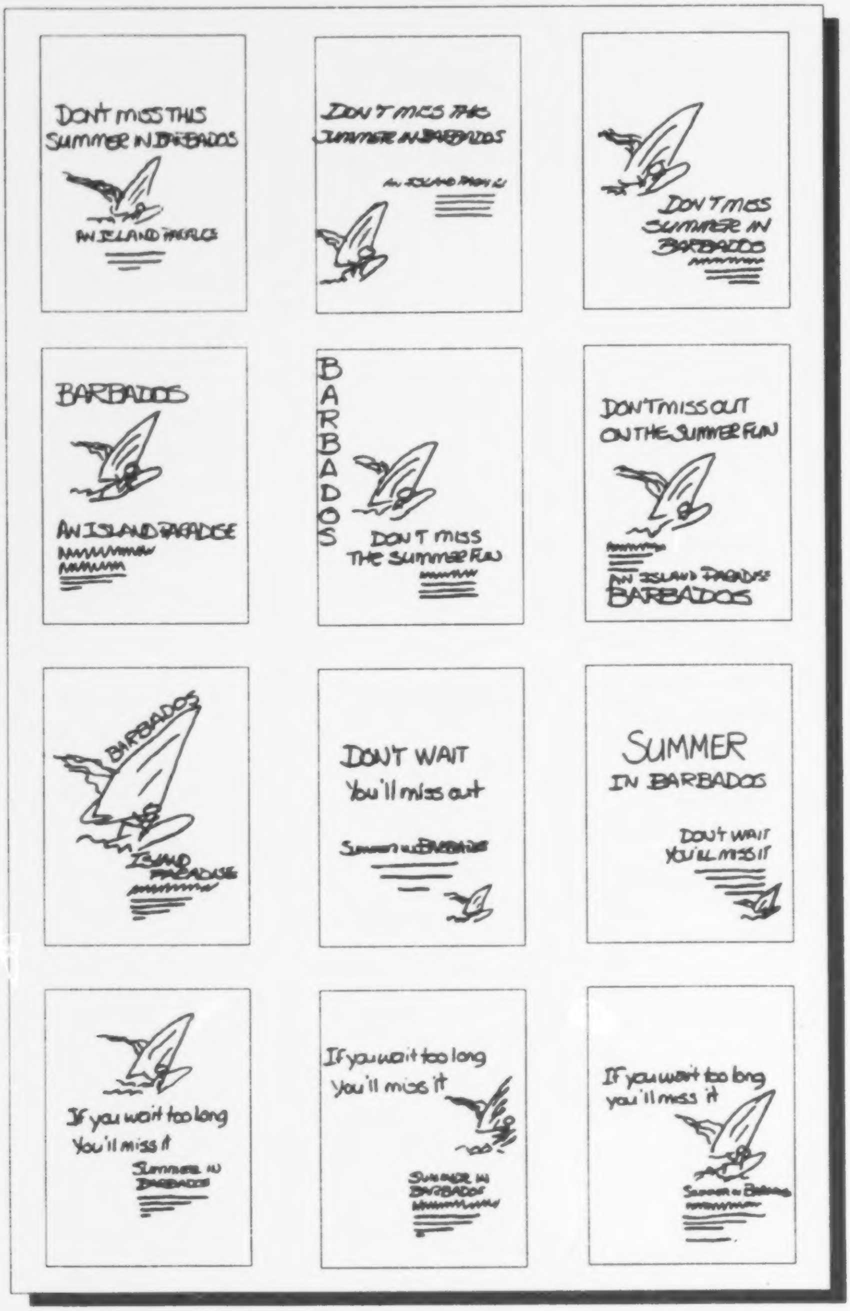


SUMMER IN BARBADOS
AN ISLAND PARADISE
Don't miss out on the summer fun
Contact your travel agent or call 685-7171

The raw material for the design. Almost every project places constraints on the designer, and here are the "musts" for the Summer in Barbados poster.

The wording of the poster is an integral part of the design. Like the layout of the poster, new ideas for the wording will come as you play with various layouts. You have decided to start with the line, "Don't miss this summer in Barbados."

The first task is to create a number of ideas for the layout design. Rough thumbnail sketches are used to develop a flow of ideas. From these ideas, a single idea will be chosen as a starting point for the development of the final poster. Often these rough ideas are shown to the customer before going any further in the design process. The key is to remain flexible so that numerous design ideas are outlined in the rough sketches. As you will see, the final design will probably incorporate ideas from several of these thumbnails.


DON'T MISS THIS SUMMER IN BARBADOS
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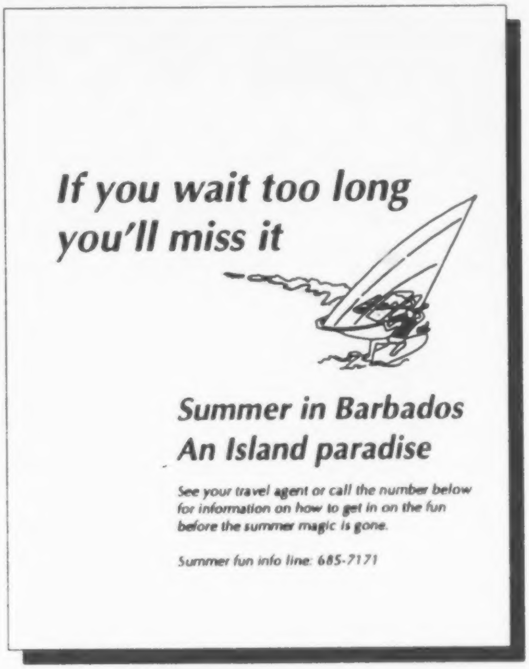
Summer in Barbados
If you wait too long
You'll miss it
SUMMER IN BARBADOS
If you wait too long
you'll miss it
Summer in Barbados

Rough thumbnail sketches give you an opportunity to play with the design of a document. They also will provide a valuable source of inspiration when you encounter problems producing the final document. Ideas from several of these thumbnails may be used in the final poster.

Notice that very little detail is roughed in. Also notice that several different design ideas are tried in the thumbnails. Generally, ideas start as conventional formally balanced designs. Then, as you begin to move items and play with their proportions, more interesting designs take shape. As you experiment with various design ideas, it is important to change the dominant item to see what will work best. It is also important to see that from the perspective of the design principles, some of these design ideas are not very well done when they are examined individually. When you consider each one as a step in a flow of ideas, their importance can be seen.

There are several interesting ideas in these sketches. However, the last thumbnail has been selected to begin the production of the final design on the computer because it represents the culmination of the design flow process. Here is the more polished computer version of that thumbnail idea.



If you wait too long
you'll miss it

Summer in Barbados
An Island paradise

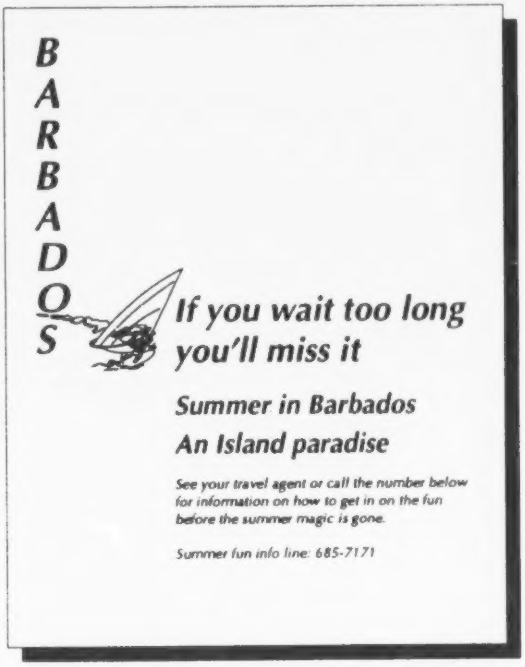
See your travel agent or call the number below
for information on how to get in on the fun
before the summer magic is gone.

Summer fun info line: 685-7171

This represents a first attempt at designing the poster. Since design is a process, you must not think that the very first version of a document will be the final product. As you can see, this design has some problems.

While it seemed like a good idea when it was sketched on paper, this design has a major flaw. The rhythm of the windsurfer graphic directs the reader's eyes off the page and short circuits the delivery of the message. Developing an idea and then seeing its inadequacies should not alarm you. You must remember that design is a cyclical process. Rarely will the first idea for a document survive unaltered to the final product. Now that you see the "warts" on the design, you can begin to modify the page until the right effect is created.

As a desktop publisher, you have a definite edge on designers using traditional methods because the computer version of a design is so easy to change. The first change to be made is to utilize the apparent motion of the windsurfer to direct the reader into the content of the headline text. You may also want to return to the series of thumbnails and see if there is another idea that can be used to improve the rhythm of the design. The new design below reflects these changes.



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If you wait too long you'll miss it

Summer in Barbados

An Island paradise

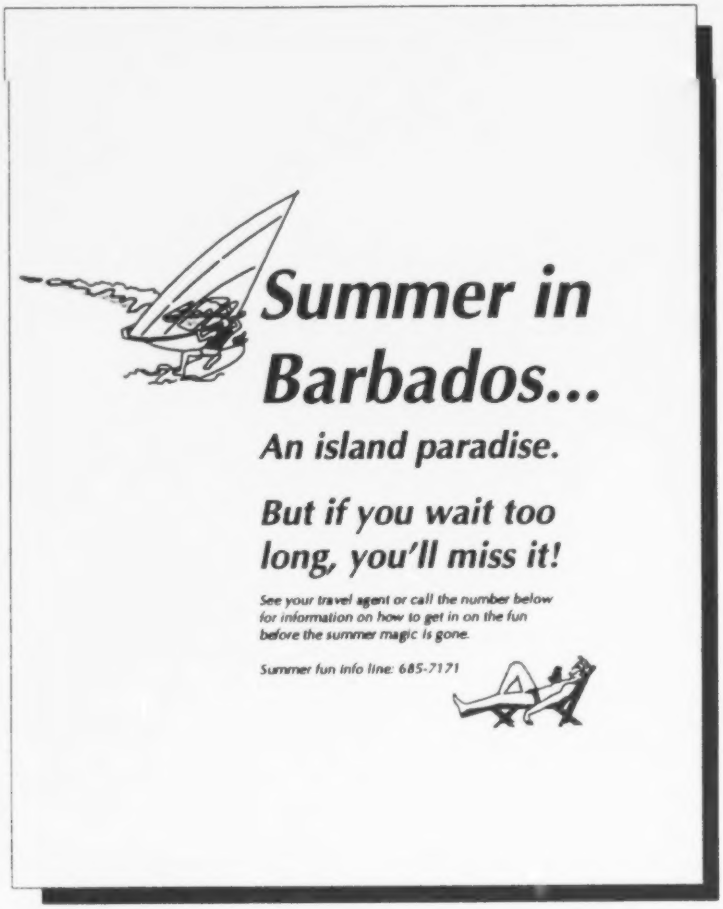
See your travel agent or call the number below for information on how to get in on the fun before the summer magic is gone.

Summer fun info line: 685-7171

Here is a second try at the poster. Another idea from the thumbnails has been added to improve on the design. This version has its problems, too, but the design is maturing.

In this second design, there has been an attempt to improve the eye movement on the page. The vertical text has been added to lead the eyes down to the graphic, which leads the eyes into the headline text. As with the first design, this idea looked more promising when sketched on paper. Three problems still remain. First, the vertical text is difficult to read. Second, the headline text is too vague. Third, the design needs a barrier in the terminal area of the page. The design on the following page addresses these problems.

The final design idea was chosen because the layout delivers the message effectively. The graphic of the windsurfer has been placed near the visual center of the page and the white space provides the contrast needed to draw the eyes immediately to that item. The apparent motion of the windsurfer leads nicely into the headline text, giving the design good rhythm. The headline text conveys the main thought of the message effectively. The text is telescoped so there will be no competing elements. The graphic does not over power the text. The text is



Summer in Barbados...

An island paradise.

But if you wait too long, you'll miss it!

See your travel agent or call the number below for information on how to get in on the fun before the summer magic is gone.

Summer fun info line: 685-7171

The finished poster. It is not perfect, but it does conform to the major principles of graphic design. The important thing to see is that it was the result of a process, not an instantaneous idea that came in a moment of inspiration.

set in oblique type to add a feeling of motion and life. There may be other design ideas that you liked better than this one, but that is what makes design so much fun: there are lots of different ideas for accomplishing the same task. As long as the designs generally adhere to the principles we have discussed, there is no right or wrong, just variations of a theme.

Summary

Now when you look at a piece of graphic art you will know that there is a lot more happening on the page than initially meets the eye. The placement, size, shade, and style of the objects are designed to get your attention, draw you into the content, keep your attention, and deliver a message. These principles of design we have discussed support the three steps of reading outlined in chapter two. Use these principles to produce attractive and effective publications.

Chapter four

■ Understanding type

“Type is a remarkably varied material. The variations are in subtle, minute details, adding up to major differences that can influence the success of your publication.”

Jan V. White

Chapter four

Understanding type

Type: The misunderstood element of design

Type is the vehicle for a message. While type can be a work of art, its job is not so much to be noticed for itself as much as it is to convey ideas and meaning to the reader. In many cases when type is performing perfectly, it is transparent to the reader. The reader interacts with the message being conveyed by the text and is unaware of how the type's attributes are contributing to that process. Perhaps this is why the use of type is so misunderstood by many desktop publishers. The electronic tools they use provide them with the capability to select and manipulate any number of typefaces in various ways. However, because they have never consciously recognized what type was doing when they read for themselves, they don't know how to use it effectively in their own publications. A basic knowledge of typography is essential if you want to fully tap the enormous potential type has for enhancing the communication of your message.

Typography, the designing of sets of character shapes for specific effects, is a complex field. It requires a knowledge of graphic design and psychology: how the design and placement of character shapes affect the eye and the mind. Typographers can spend years developing the designs for a single typeface. A detailed description of this process is beyond the scope of this book, but we will look at some of the basic concepts of type so that you can be more of a master of this key element in the production of successful desktop publishing.

Take a closer look at type

Characters are graphic images. They are symbols to which we have ascribed standard meanings. Characters are combined into words, which are more sophisticated symbols. Characters are the basic building blocks of written communication. However, words, not individual characters, are the basic building blocks of reading. Thus, the design of individual character shapes cannot be done in isolation from other characters. Typographers have four goals when designing a new typeface. They must ensure that character shape aids the reading process by making the characters easily recognized, by making combinations of characters flow together easily, by creating character designs that express the desired emotion, and by ensuring that character shapes for entire typeface have continuity of design; that is, they look like they belong together.

Since characters are graphic images, appearance is more important than adhering to rules. You can see this by looking at the letters *y*, *p*, and *e* in the word "Type" in the illustration on the following page. The rule is that the top of lower case letters should be aligned with the x-line. You will notice that the top of the *y* adheres to this rule. You will also see that the bowl of the *p* and the *e* extend beyond the x-line. This is done to overcome optical illusion. If the *p* and *e* stopped at the x-line they would appear smaller than the rest of the letters, as though their size had been selected incorrectly.

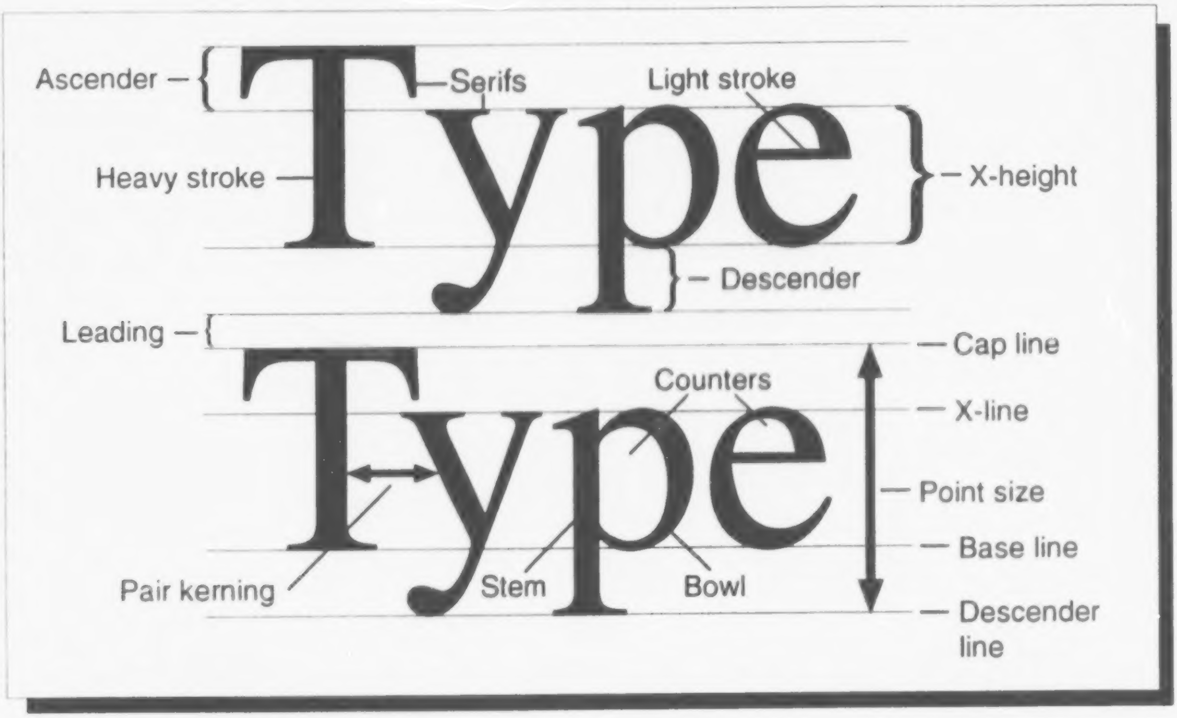
As was the case when we looked at the basic principles of graphic design, there is more going on than initially meets the eye. The type on the page is designed to illicit certain responses from the reader. To understand how this is done, you must first spend some time becoming familiar with the terms and concepts of type. In this way, you can come to identify the attributes that may need adjusting in order to enhance the communication of a particular message.

The attributes of type

This section will identify some of the main characteristics of type so that the discussion on using type effectively will be more clear. Many of the terms listed here are deeply rooted in the history of written communication. Two developments are worth mentioning briefly as background to this discussion. The first is the development of uppercase letters by the Greeks and Romans. The strokes they created for their letters provided the foundation for all of our modern character shapes.

The second development is the invention of the printing press with movable, reusable metal type. Most of the credit is given to Johann Gutenburg, a German, who made a functional press in 1450. Although presses with wooden type had been developed earlier in the Orient, Gutenburg's system of metal type was so successful it achieved universal acceptance. Many of his original ideas for printing are still found in print shops today. Consequently, many of Gutenburg's ideas are also found in the electronic software tools of desktop publishing.

Typeface	A set of designs for the shape of each character, number, and symbol used in a specific style of lettering.
Base line	A horizontal reference line for aligning lines of text. The lowest part of lowercase letters with no descenders (like the letters *a, c, e, i, k, l, m, n, o r, s, t, u, v, w, x, and z*) and all uppercase letters rest on the base line.


Ascender
Serifs
Light stroke
Heavy stroke
X-height
Descender
Leading
Cap line
Counters
X-line
Point size
Base line
Pair kerning
Stem
Bowl
Descender line
Type
Type

The attributes of type. Many of the terms listed here originated from the first lettering done with brush/pen and from early printing done with metal type.

X-line	Also known as the mean line. A horizontal reference line for aligning lines of text. The highest part of lowercase letters, excluding ascenders reach this line.
Cap line	The highest part of uppercase letters and the ascenders of lowercase letters reach this horizontal reference line.
Descender line	The lowest part of lowercase letters reach this horizontal reference line. Uppercase letters have no descenders except *Q*.
Ascender line	The highest part of lowercase letters reach this horizontal reference line. This line is slightly higher than the cap line.
X-height	Also known as body height. The height of lowercase characters that have no ascenders or descenders, like the letters *a, c, e, m, n, o, r, s, u, v, w, x, z*.
Ascender	The part of a character that extends above the x-height on letters like *b, d, f, h, k, l, t,* and all uppercase letters.
Descender	The part of a character that extends below the base line on lowercase letters like *g, j, p, q, y*.
Stroke	A single line, curved or straight, that would be produced by a single stroke of a pen nib or brush when hand lettering.

Stroke weight	A term used to define the thickness of character lines. Thicker lines have a heavier weight.
Stem	The straight and usually vertical lines of character.
Bowl	The curved, loop-like part of a character found on letters like *a, b, c, d, e, O, P, Q, R,* and so on.
Serif	A short line added at the end of a stroke. Serifs originated from hand drawn strokes with a flattened brush or pen nib. The serif corresponds to the beginning or ending of the brush or pen stroke. See "Classifying typefaces" for more detail.
Counter	A fully enclosed white space within a character. They can be seen in letters like *a, b, d, e, g, o, p, q, A, B, D, O, P, Q,* and *R.*
Leading	Pronounced "ledding." The vertical spacing between lines of text. It is often set at 2 points between the descender of one line and the ascender of the next. The term comes from the first printing that was done with metal type. To separate the lines of type, strips of lead were inserted so that ascenders and descenders from different lines would not touch.
Set width	The space required for an individual character, including the white space needed for character spacing. The set width varies for each character and is dependent on the size of the type. This is another term that comes from printing with metal type. Since each character was cast on a piece of metal the width of the character, its white space was set by the width of the piece of metal.
Kerning	The process of reducing the space between certain pairs of characters to overcome awkward-looking white spaces that occur due to the set width for each letter. Typically kerned pairs include *AV, TA, LY, Tr, Ty, To, Av,* and *Ay.*

Measuring the size of type

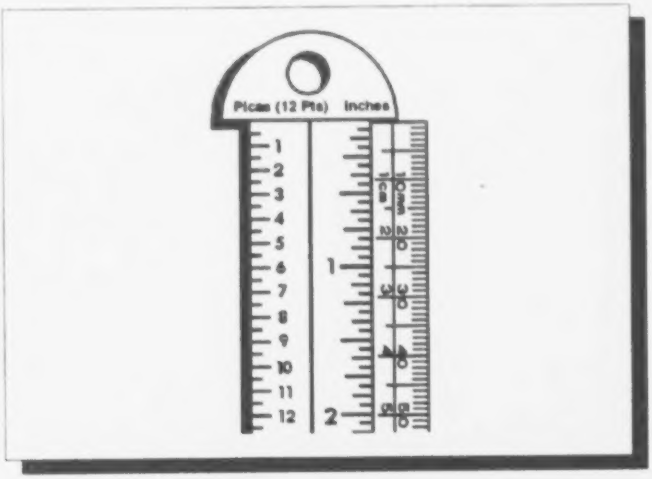
Point	A unit of measure for type developed by printers so that very small distances could be measured without having to use fractions. Although the original printer's point was slightly larger, today, primarily due to the resolution of the Macintosh computer's screen, 1 point is taken as exactly 1/72nd of an inch. Type is measured vertically from the descender line to the ascender or cap line. This will explain why 14-point type generally looks smaller than 14 points. It is because most characters do not have both an ascender and a descender and most lowercase characters have neither.
Pica	Another printer's unit of measure. 1 Pica equals 12 Points or 1/6th of an inch.

Em space Also known as an em square, em quad, or mut. Originally, a square large enough for the largest character in a typeface: the letter *M*. Today the em space is defined as a square with a side length equal to the font size. Thus, the em space for 10 point text is a square 10 points by 10 points. This makes the em space a very useful unit of measure because its size is always relative to the size of the type being used. The em space is used to measure several features of type. Measuring paragraph indentations (one or two em spaces) and using fractions of the em space to measure the size of word spacing (one half of an em) are just two examples.

En space Also known as a nut. A rectangle that is produced by cutting an em space in half vertically. Fractions of the en space are often used for measuring character spacing. Lowercase letters are often designed with a set width of one en space.

Body type Type that measures 12 points or smaller. Also known as text. The most common sizes for body type are 10 and 12 points.

Display type Type that measures larger than 12 points. It usually refers to the type for titles, headlines, subheadlines, and so on.



This is a traditional printer's ruler that has been matched with a metric ruler. Remembering that there are 12 points in a pica you can see the relationship between points, picas, inches, centimeters, and millimeters.

Classifying typefaces

Since Gutenburg created the first set of metal characters, literally thousands of different typeface designs have been developed for printed communication. Selecting just the right typeface for a particular message from this vast array of designs can be an overwhelming task. To help make the selection of typefaces for specific uses easier, a system for classifying typefaces has been developed. As a publisher, you should be aware of this method for categorizing typefaces. Take the time to understand this information. It will come in handy as you progress in your use of type.

Typefaces are classified according to six main characteristics of the design of the characters. These characteristics are the class, face, angle, stroke weight, character width, and size of the type. This table outlines how typefaces are classified.

Class	Face	Angle	Stroke Weight	Character Width	Size
Serif	Bookman Garamond Times	Roman Italic Oblique	Hairline Thin Extra Light Light Book Regular Medium Demi Bold Semi Bold Heavy Black Ultra	Normal Condensed Expanded	4 Point 5 point 6 point 7 point 8 point 9 point 10 point 12 point 14 point 18 point 24 point 36 point 48 point 60 point 72 point 86 point 120 point 148 point 196 point 244 point 292 point 388 point
Sans Serif	Avant Garde Helvetica News Gothic				
Square Serif	Aachen Lubalin Melior				
Text	Castle Gregorian London				
Script	Calligraphy Coventry Freestyle				
Novelty	AKI Lines Crome				

Understanding typeface names

Typeface names are determined according to the table shown above. Here are two typeface names. They tell you all that you need to know about the type. Both typeface names listed below convey the same amount of information.

Times 12 point
Helvetica Italic Light Condensed 24 point

You will notice that the class is not stated in either of the names. This is standard. You must remember the class of typeface you are dealing with. You will also notice that the first typeface name does not state the angle, stroke weight, or character width. This means that the angle is roman, the stroke weight is regular, and the character width is normal. This also is standard. These characteristics are stated only if the type is either italic or oblique, has a stroke weight other than regular, and has either a condensed or expanded character width.

Understanding the six characteristics used for classifying typefaces is important. Let's examine each in detail.

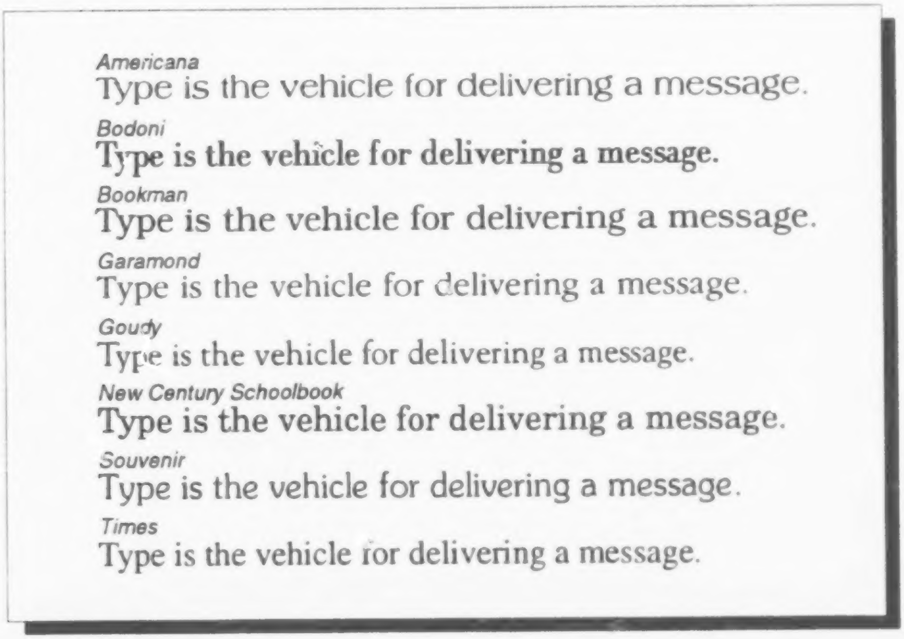
Class

There are several schemes for grouping typefaces into classes. Here is one of the simplest and most useful ways to group typefaces. In this scheme, the various designs for typefaces are grouped into six major classes according to broad similarities of design. These classes are Serif, Sans Serif, Square Serif, Text, Script, and Novelty.

Serif or Roman Serif typefaces are characterized by a wide variety of serifs and great variation between thick and thin strokes in their characters. Serifs may be angular, rounded, rectangular, or some combination of the three.

Serif or Roman Typefaces

Serif typefaces are ideal for body type. They are highly readable, in fact, the most readable typefaces you can use. We will discuss the readability of type more fully in the next chapter. Their use is not restricted to body type, however. Serif typefaces also work well in headlines, advertisements, letterhead, etc. Here are some examples of Serif typefaces:



Serif typefaces.

Americana
Type is the vehicle for delivering a message.
Bodoni
Type is the vehicle for delivering a message.
Bookman
Type is the vehicle for delivering a message.
Garamond
Type is the vehicle for delivering a message.
Goudy
Type is the vehicle for delivering a message.
New Century Schoolbook
Type is the vehicle for delivering a message.
Souvenir
Type is the vehicle for delivering a message.
Times
Type is the vehicle for delivering a message.

Sans Serif Sans Serif typefaces are characterized by simple strokes of equal weight or thickness with no end strokes or serifs. True Sans Serif typefaces have no variation on stroke weight, but some new styles now have slight variation in thickness.

Sans Serif Typefaces

Type set in Sans Serif typefaces is easily recognized. This makes these typefaces well suited for signs, headlines, labels, or anywhere type must be easily understood. The use of Sans Serif typefaces for body type is a point of much contention that will be dealt with in the next chapter. Here are some examples of Sans Serif typefaces:

Sans Serif typefaces.

Avant Garde
Type is the vehicle for delivering a message.

Franklin Gothic
Type is the vehicle for delivering a message.

Helvetica
Type is the vehicle for delivering a message.

News Gothic
Type is the vehicle for delivering a message.

Square Serif A hybrid style of typeface that is a cross between Serif and Sans Serif typefaces. Square Serif typefaces have serifs like romans, but the serifs are rectangular and blunt instead of curved and pointed. Originally, the stroke weight for these typefaces was equal for all characters like the Sans Serif typefaces. New designs have variation in stroke weight.

Square Serif Typefaces

Many Square Serif typefaces are not well suited for body type. The geometric shape of the characters tends to slow reading. There are good Square Serif designs for large amounts of copy, but care should be taken when selecting a Square Serif typeface for body type.

Square Serif typefaces.

Aachen Bold
Type is the vehicle for delivering a message.

Claredon
Type is the vehicle for delivering a message.

Melior
Type is the vehicle for delivering a message.

Playbill
Type is the vehicle for delivering a message.

Text This style resembles the hand-written scrolls produced by the monks and scribes in the middle ages. This style is also called Old English. Type in a text typeface is characterized by heavy vertical and diagonal strokes and thin connecting lines. This variation was originally the result of a pen nib or quill being drawn across the paper at various angles.

Text Typefaces

The "middle ages" feel of Text typefaces is ideal for use by churches or anywhere there is a need to create a religious mood. Formal announcements and invitations can also be done with Text typefaces. You should note, however, that this style of type is very hard to read. It should not be used for large blocks of type. In addition, the uppercase letters in a Text typeface are usually ornately decorated and are not designed to fit together. Thus, Text typefaces should never be set in all capital letters. Here are four Text typefaces:

Text typefaces.

Castle
Type is the vehicle for delivering a message.
Daily Tribune
Type is the vehicle for delivering a message.
Gregorian
Type is the vehicle for delivering a message
Linotext
Type is the vehicle for delivering a message.

Script This style resembles modern handwriting. This style is also called the Cursive type style. Script type is characterized by letters that slant to the right and tend to flow into each other, although not all Script typefaces join the letters together.

Script Typefaces

The mood of script typefaces covers the entire range from casual to formal. Care must be taken to match the mood of the specific typeface to the mood of the message to be conveyed. Generally, script type is not very readable and should not be used for large blocks of text. Like the capital letters in Text typefaces, capitals in Script type are usually decorative and do not fit well together. Script type can be used for headlines, advertisements, invitations, and announcements. Here are some examples of Script typefaces:

Script typefaces.

Brush Script
Type is the vehicle for delivering a message.

Calligraphy
Type is the vehicle for delivering a message.

Coventry Script
Type is the vehicle for delivering a message.

Prelude Script
Type is the vehicle for delivering a message.

Novelty This type style includes any typeface that does not fit in any of the previous five families. Typefaces in the novelty category include slight variations of traditional styles as well as styles that are wild, humorous, futuristic, ornate, silly, and so on. Novelty typefaces are usually very unique and eye catching. They are designed to get your attention. This makes them ideal for headlines, advertisements, and letterhead. As a rule, Novelty typefaces do not work well for body type.

Novelty typefaces.

AKI Lines
NOVELTY TYPE

Cottonwood
NOVELTY TYPEFACES

Crome
NOVELTY TYPE FACE

Relief
NOVELTY TYPEFACES

RightBank
NOVELTY TYPEFACES

Rubberstamp
NOVELTY TYPE

Face

What's in a name?

Each new typeface design is given a name for ease of identification. This sounds quite straightforward and in theory, it is. The problem is that designs for typefaces cannot be copyrighted. This means a number of typeface companies may have their own versions of Melior, for example. To make matters worse, there may be different names for essentially the same typeface design. One company may call their typeface Melio, another Meliors, and so on. Yet another company may have a completely different name for exactly the same design. This problem is especially acute for desktop publishers because numerous developers of typefaces are operating in a highly competitive market. Therefore, don't choose your typefaces by name. Avoid unpleasant surprises by holding to a policy of always looking at actual examples of type printed on paper.

Angle

There are two standard angles for type. Roman type is vertical. The stems are oriented perpendicular to the base line. Italic and oblique type are usually slanted approximately twelve degrees to the right. These angles can be seen in the four examples of type, below.

Italic vs. oblique characters: they both slant to the right but only the italic characters are redesigned.

Souvenir Roman

The angle of type

Souvenir Italic

The angle of type

Optima Roman

The angle of type

Optima Oblique

The angle of type

Look at the characters in top two lines of Souvenir type. Notice that the italic type is not just a slanted version of the roman type. The italic type has been totally redesigned. You can see this clearly by examining the lower case *a* in these two lines.

Oblique type is simply a slanted version of the roman typeface. You can see the effect created by oblique characters in the two lines of Optima type. The characters are not redesigned. Oblique type is what you usually get from most desktop publishing programs when you ask for italics. The computer simply puts the roman version of the type through a mathematical transformation to slant the characters to the right. They are not true italics. If you want the real thing, then you must purchase an additional italic typeface.

Stroke weight

Many novice publishers are unaware of the power of stroke weight as a communicator. There is a wide range of stroke weight available to desktop publishers. Here are some examples of stroke weight names and effects they create.

Extra Light Light Book **Medium**
Demi Bold **Semi** **Bold** **Heavy**

The wide range in stroke weight that is available can be used to greatly enhance the communication of messages to readers.

Character width

Typefaces can be stretched and compressed. Not only can such manipulations create special effects, but they can also be helpful when trying to fit a certain amount of type into a certain area on the page. The standard terms used are normal, condensed, and expanded type. You can see the following examples. Notice that the designs for the characters have not changed. Only the character width is affected.

Notice that the design for individual characters does not change as type is condensed or expanded.

Helvetica Condensed
Character Width
Helvetica Normal
Character Width
Helvetica Expanded
Character Width

Traditionally, printers had separate sets of metal type for the condensed and expanded versions of a typeface. Consequently, they had only one version of the condensed and expanded designs of a typeface. The variety of condensed and expanded type has greatly increased with modern electronic tools. These programs can perform mathematical transformations of the type to produce virtually any width required.

Size

As mentioned earlier in the chapter, type is measured in points. The point size is measured vertically from the descender line to the cap line. This is an important fact to remember. Many people think that since one point is 1/72nd of an inch that 72-point type will be one inch high. But most characters do not have both a descender and an ascender. Only the capital *Q* measures the complete point size of the type.

The body text of most publications ranges from 10 to 12 points in size. Headlines and lead-in text can run the entire range of sizes. Here are some examples of various point sizes in the New Century Schoolbook typeface.

6 Point Type
7 Point Type
8 Point Type
9 Point Type
10 Point Type
12 Point Type
14 Point Type
16 Point Type
18 Point Type
24 Point Type
30 Point Type
36 Point Type
48 Point Ty
60 Point T
72 Point

The use of points to measure type was started by printers who did not want to deal with fractions. A point is sufficiently small to describe very small type in whole numbers.

Typeface families

A family of typefaces includes all of the typefaces that share the same root. Each individual typeface in the family has its own distinguishing characteristic, but the basic design for the characters is the same. Here are some examples of typefaces in the Helvetica family.

Here is part of the Helvetica typeface family. As you can see, limiting yourself to a single family of type still gives you lots of variety for your designs.

Helvetica Ultralight
Helvetica Ultralight Oblique
Helvetica
Helvetica Oblique
Helvetica Outline
Helvetica Shadow
Helvetica Narrow
Helvetica Narrow Oblique
Helvetica Narrow Outline
Helvetica Black
Helvetica Black Oblique
Helvetica Black Out...

The concept of a typeface family is an important one for you as a publisher. You can use any number of the typefaces in a family on the same page without violating the principle of typographical unity in your design. So make sure that you use the great range of effects in a typeface family to give your documents variety and life.

Summary

Type is a critical element of design. To use it effectively you must understand how it works. Learning the attributes of type covered in this chapter is an important step in mastering the use of type in your publications. The discussion in the next chapter will draw on your new found understanding as you begin to manipulate the attributes of type for desired effects.

Chapter five

■ Using type effectively

> "Type, when used appropriately, should be transparent; that is, readers do not notice the type as much as they see through it to the message it contains."
>
> Ted McCain

Chapter five

Using type effectively

Type is an active element of design

We all know that people can express moods and emotions with facial expressions, the tone of their voice, and the position of their body. Sometimes the communication is overt and sometimes it's subtle. Type can express moods and emotions, too. Type can be serious and business like, or it can be relaxed and open. It can shout at you, or it can give its message quietly. Type can be authoritative and bold, or it can be tentative and meek. It can be happy, humorous, stiff, formal, old fashioned, contemporary, even futuristic. Type is rarely neutral. You must be very conscious of this expressive nature of a typeface if you want to avoid confused messages and obtain the maximum impact for your publications.

Watch your body language!

In the same way a person's body can send out messages during a conversation, typefaces have their own "body language." The body language of the type you choose for a document can greatly enhance or inhibit the communication of its message. Consider the messages being sent by these two phrases:

Spring Flowers
Bricks and Mortar

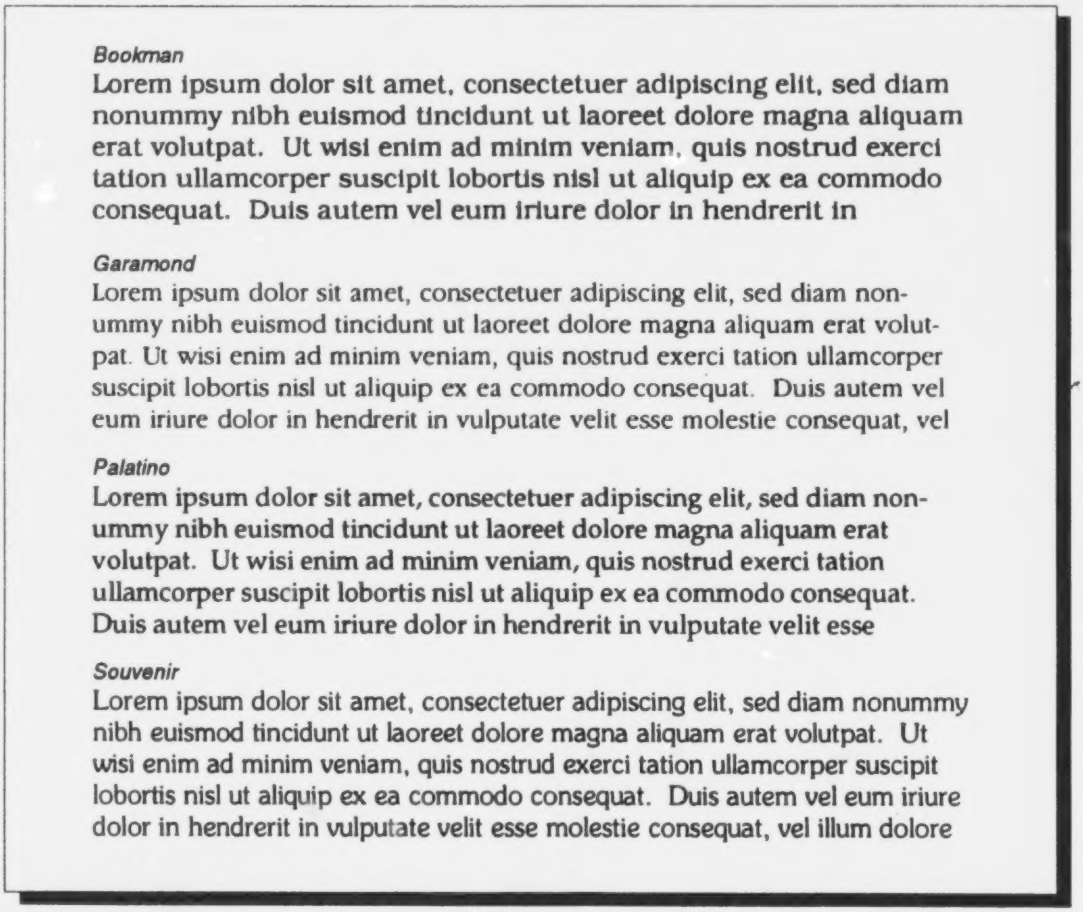
The words are saying one thing, but the type is saying another. But if we match the "body language" of the type with the message of the words, the impact is greatly enhanced.

Spring Flowers
Bricks and Mortar

To use type effectively, you must look at the text in your documents from an entirely different perspective. You must see type as a dynamic, active element on a page. View the type in a document as soft and mouldable, like the clay in a potter's hand. Type can be worked and reworked on a page until just the right effect is achieved. Experimentation is a key to the successful use of type. The electronic tools of desktop publishing give you the power to change the type very easily. Get in the habit of exploiting this capability to find the right combination of type and content for effective communication.

Communicating with the texture of type

Lines and blocks of type are graphical objects. They have a shape, size, shade, and sometimes, a color. The texture of type refers to the overall shade of gray created by the typeface selected for a particular line or passage of text. It is an extension of the body language concept of type, and it is a subtle yet powerful agent in the communication process. Look at the following four blocks of type from the perspective of the texture created by the different typefaces.



Bookman

Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis autem vel eum iriure dolor in hendrerit in

Garamond

Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel

Palatino

Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse

Souvenir

Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore

The design of a typeface creates a very distinctive appearance for blocks of body text. This "look" is a powerful communicator and should be matched with the tone of the message.

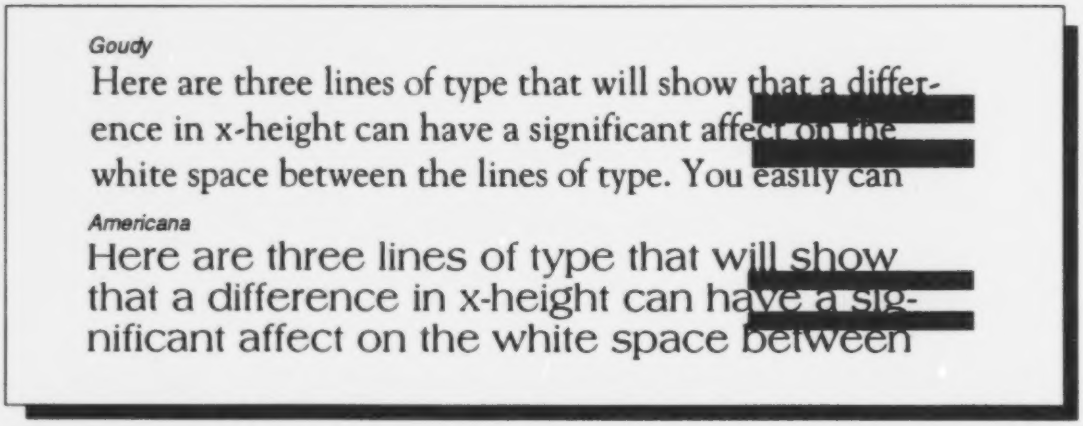
Suppose that you had to select one of these four typefaces for a document that must project a strong, serious, authoritative message, one that demands respect. Which one would you choose? Probably you would select the Bookman typeface because it creates a bold look and feel that is consistent with your message. Now suppose that you had to select one of these typefaces for a light hearted, humorous, fictional novel. Would the texture of Bookman be consistent with this new message? The Garamond typeface creates a much more open and easy going look and feel that is more in line with the content of such a novel. So you see the texture created by a typeface can greatly add to the communication of a message.

What gives type its texture?

There are three main attributes that determine the texture of a typeface. They are the x-height of the type, the stroke weight used for the characters, and the amount of leading that has been set between the lines of text. All three affect the amount of white space left on the page after the type has been printed. The general principle of texture is: the more white space, the more light, open, and easy going the texture appears. Less white space creates a darker texture that appears more serious and authoritative.

X-height and texture

The x-height of a typeface has a significant effect on the texture that is created on the page. The reason for this is the visual line spacing. The visual line spacing is the white space between the baseline of one line of type and the x-line of the following line. Typefaces with a large x-height leave less white space and typefaces with a small x-height leave more. You can see the difference in white space that x-height makes in the two examples of type, below.



Goudy

Here are three lines of type that will show that a difference in x-height can have a significant affect on the white space between the lines of type. You easily can

Americana

Here are three lines of type that will show that a difference in x-height can have a significant affect on the white space between

The x-height determines the visual line spacing, as illustrated here. The larger the x-height, the less visual space between the lines of text.

These two blocks of text are exactly the same point size. The difference is that the Americana type has a much larger x-height than the Goudy type. You can easily see that the smaller x-height leaves more white space between the lines by looking at the width of the gray bars at the right end of the lines. For this reason, a larger x-height generally gives the text a darker texture on the page. Look at the following two passages of type and consider the texture that these typefaces produce.

Goudy

Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at

Bookman

Lorem ipsum dolor sit amet, consectetuer adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis autem vel eum iriure dolor in hendrerit in vulpu-

Generally, type with a larger x-height has a darker texture.

Stroke weight and texture

A much more powerful factor in determining the texture of type is stroke weight. Typefaces with thin strokes leave more white space than those with thick strokes. Thin strokes create a lighter texture that appears more delicate and easy going than thick strokes, which create a darker texture that gives the text a bold and important look. Consider the following two passages of type. Which one is strong and authoritative? Which one is light and elegant? You can see that stroke weight is a major factor in the impact created by the texture of type.

Claredon

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Garamond

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Stroke weight has the most impact on the texture of type.

Leading and texture

Now examine the following two blocks of type. You will notice that the lower block has a more open look to it. What differences can you see between the two passages that create this change in texture?

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Can you see which attribute of the type has been changed to alter the texture of the lower passage of text?

The only difference is the leading. You will remember that the leading is the space between the descender line of a line of type and the cap line of the following line of type. By adjusting the leading you can greatly affect the texture of a page.

Leading is usually set at two points and, therefore, the visual space between the lines of type is usually determined by the proportional size of the ascenders and descenders of the type. Many electronic publishing programs, however, allow you to adjust the amount of leading as desired. This makes leading a unique factor in the discussion of texture because it is the only factor that can be manipulated for effect. Less leading can be used to project a feeling of an abundance of information by slightly crowding the lines of type for a darker texture. More leading will open up the type's appearance for a lighter more relaxed texture. More leading will also mean that the page cannot hold as much text as before. Adjusting the leading is an ideal solution when the desired typeface matches your message in every way other than the texture of the type.

Leading is almost always stated in conjunction with the point size of the type. To understand this way of expressing the leading of type you must think of the leading as the vertical space between each line of text. If you are using 12 point type and 2 points of spacing keeps the ascenders and descenders from different lines apart, you can see that the line spacing would be 14 points. Therefore, the leading for the type could be expressed as 12 on 14. Here are some examples of the effect created by expanded and reduced leading.

Melior 10 on 8

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Melior 10 on 16

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Leading affects the spacing between the lines of type. Notice that the amount of leading is stated after the size of the type. Also notice the effect of the leading on the texture of the type.

Texture is a result of an interaction

The overall texture made by any particular typeface is the result of an interaction of these three main factors just discussed. Keep the x-height, the stroke weight, and the leading of the type in mind when you are selecting a typeface for a particular message. Always consider the expressive nature of the design of the characters in a typeface and how the texture they create in blocks of text on the page can support the message you are trying to communicate.

Type for reading

The ultimate goal of most publications is to draw the reader into reading passages of body text. These documents are designed to generate enough interest so that readers will be sufficiently motivated to do the work of reading; and reading is work. Knowing that reading is work and knowing that the reader may only be moderately interested in the message means that the hold of the document's text on a reader is often very tenuous. Thus, it is imperative that the written body content of a document be as easy to read as possible.

If you are like most people, you probably have never considered how the design of a typeface facilitates or inhibits the reading process. But it is an important consideration for you as a publisher because it has a profound effect on the effectiveness of your work. What follows is a discussion of how typeface designs affect the reading process that will help you to select the right typeface for the body text of your documents.

Readability versus legibility

And you thought typographers were quiet gentle folk!

One of the major controversies that has raged in typography for years concerns the use of serifs on characters and their effect on reading behavior. One of the surest ways to spark a heated debate in a room full of typographers is to ask them, "Which is more readable, serif or sans serif type?" Several hours later, you will likely be no wiser as to the relative merits of these typeface designs, but you will have learned a thing or two about typographers!

The basic concepts that underlie the controversy over the use of serif versus sans serif typefaces are rooted in how a person reads. Let's cover the basics, then we can argue!

How we read

In terms of reading, type has two main attributes — its readability and its legibility. To understand these concepts, you must first examine how a person reads. It is important to note that there are major cultural differences in how people read. Some languages in the middle east, for example, are written on the page from right to left. This has an enormous impact on the design of a document. This book, however, is targeted at an English speaking audience, and so this discussion will be limited to the characteristics of English readers only.

Due to years of training, if an English speaking person encounters a block of text with no other distracting elements on the page, the eyes will move to the upper-left corner of the text to begin reading. From there the eyes move horizontally along the lines of text from left to right with a rapid return sweep when the end of a line is reached.

The eyes do not move smoothly through the text, however. Careful study has revealed that the reader's eyes jump and fixate as text is read. The study of the reading process has also revealed that reading is accomplished much more by the recognition of entire words and phrases than by individual characters. Furthermore, when a reader is engrossed in the content of what he or she is reading, the fewer distractions the better. Unfamiliar words, contrasting qualities of type, irregular spacing or anything else that distracts the eye from a smooth and rhythmic horizontal path through the text will cause reading to slow due to an increase in fixations, backward jumps to reread, or non-horizontal eye movements.

Readability and legibility

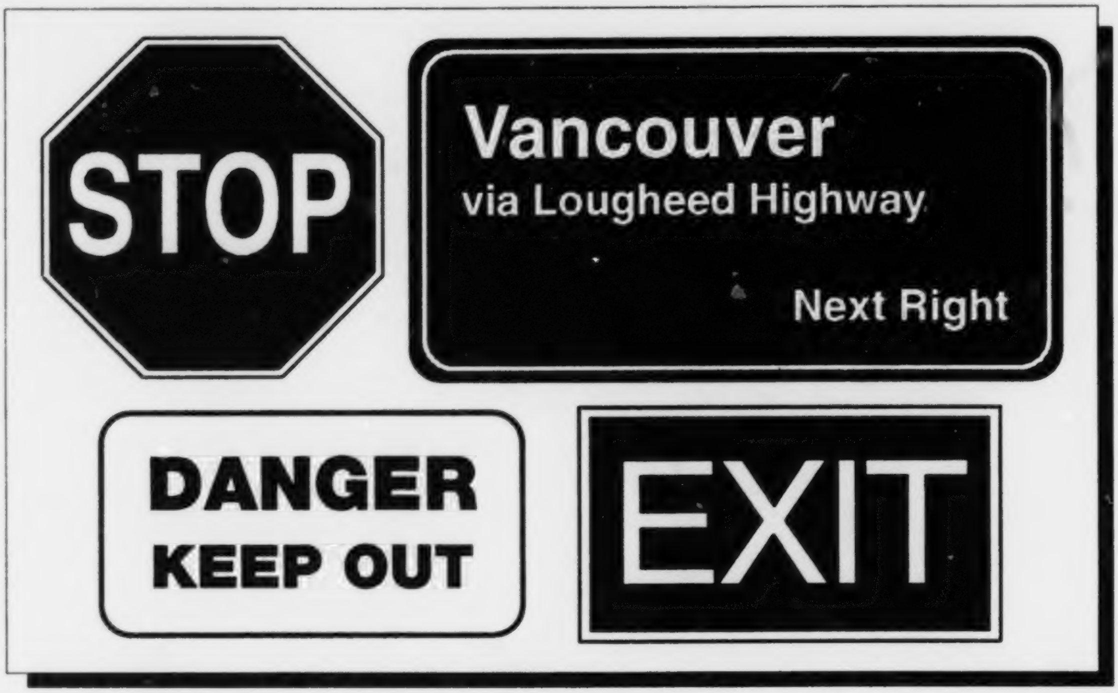
The readability of type refers to the ease of movement through a body of text. Some equate readability with the speed at which type can be read. To be readable, a typeface must facilitate the continual jumping of the eye with a minimum of fixations. Readable type is a must for long passages of text such as those found in a novel, for example.

The legibility of type refers to the ease of recognition of individual characters and, particularly individual words. Legible type facilitates the extraction of meaning from text. To be legible, a typeface must be clean and uncluttered so that shapes of the characters maximize immediate access to the meaning of the words.

To serif or not to serif

The controversy mentioned above centers on how the use of serifs in the design of typefaces affect the readability and legibility of text. Over the years many studies have been done on the relative merits of serif versus sans serif typefaces. The results have not settled the issue conclusively. But in this book, we are not really concerned with all of the points to be made on both sides of the argument. What you need as a desktop publisher is some direction in how to use type more effectively. Here then, are some general guidelines for selecting type for body text.

Classic sans serif typefaces are characterized by plain strokes of equal weight. These simple uncluttered strokes give sans serif type long straight lines and clean simple curves with a maximum of white space. With high black/white contrast they are very effective at catching the reader's eye. The straightforward strokes make word recognition effortless. For these reasons, sans serif typefaces are the most legible. They are almost always used whenever a line of text must get a reader's attention and convey an important or urgent message. Take a look at street signs, or exit signs, or other lines of text that must be immediately recognized. They are almost always set in a sans serif typeface.



When an important or urgent message must be communicated, you will find that the type is usually set in a sans serif typeface because the clean simple character shapes are the most legible.

Life is full of trade-offs, however, and the legibility of sans serif type comes at a price. The simple straight lines of the characters are predominantly vertical in orientation. As mentioned earlier in the discussion of the graphic design principles, the eye has a propensity to follow straight lines. The straight vertical lines of most sans serif type hinder the smooth and continuous horizontal movement of the eye along long lines of body text. These clean vertical lines pull the eye down the page instead of along the line. In addition, the high black/white contrast created by the clean, simple strokes in sans serif type causes the eye to fixate rather than flow through the text.

Serif typefaces are designed to counteract much of what is incorporated into sans serif type. Examine the serifs in the sample of the Times typeface on the next page. Compare the overall effect to that of the sample of Helvetica.

You will see that the serifs cut into the white space around the individual characters resulting in less contrast. Furthermore, you will see that the serifs are predominantly horizontal in orientation. These horizontal serif lines direct the eye along a line of text as the reader reads. They also help the eye to find the correct line on the rapid return sweep. The net effect of adding serifs to the type is a more readable type due to the horizontal direction of the type and the lessening of contrast.

Helvetica

The week of July 27 to August 3 is being designated Multi-cultural Week in our community. Numerous activities are being planned to heighten our awareness of our diverse cultural heritage. The first of these activities will acquaint local residents with the numerous Asian and European groups that live in our area. Several restaurants and delicatessens located downtown will be preparing a variety of ethnic foods for you to sample. Visiting

Times

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Compare these typefaces. Which promotes the horizontal flow of the eyes through the text? Which one grabs your attention with black/white contrast?

Serif typefaces, too, have their drawbacks. One of the great pluses of serif type is also one of its minuses. Serif type is characterized by a wide range of stroke weight in a single character. While this has spawned a great variety of designs, it has also created problems for the reproduction of serifed type, especially with modern photocopy, laser printer, and printing press equipment. One of the problems is that the thin strokes of the characters can be damaged or disappear completely unless high quality paper and/or printing equipment is used.

Bodoni

Thin lines can disappear in small type.

Thin lines can disappear in small type.

A typeface like Bodoni is particularly susceptible to damage from photocopying, especially when the type is small, because the characters have a wide range of stroke weight in their design. The delicate strokes and fine serifs are often missed when they are photocopied or printed with inexpensive plates on poor quality paper.

Another problem is that the lack of white space in serif typefaces can actually render the text unreadable at small point sizes. Photocopiers, laser printers, and low quality paper printing plates tend to overfill the counters of the characters with toner or ink. Also the serifs of different characters tend to run into each other, which lowers the readability even further.

Times 6 Point

Small type can be a problem when set in a serifed typeface. The counters tend to over fill with ink or toner when the type is reproduced.

Helvetica 6 Point

Small type can be a problem when set in a serifed typeface. The counters tend to over fill with ink or toner when the type is reproduced.

Small serif type can be a problem when it is reproduced on inexpensive photocopy, laser printer, or printing equipment. The characters fuse together, and the counters tend to clog with too much ink or toner. To solve this problem use a sans serif typeface with a large x-height for maximum readability.

Some suggestions for the use of serif and sans serif type

There are many factors to consider when selecting a typeface for a particular document. If you are new to publishing, you need some general guidelines to help you get going. Here are some suggestions.

- Use serif typefaces for body text, headlines, and lead-ins. Serif typefaces are very versatile. They are your best choice for use as the body text of a document. Their design facilitates continuous movement of the eye along lines of type, making them highly readable. However, never mix two different serif typefaces on the same page if serif type is used in headlines and lead-ins as well as the body text.

- Use sans serif typefaces for titles, headlines, sub-headlines, or any other text that must get the reader's attention and deliver a message quickly, especially if you want high impact for these lines. The sans serif type will provide contrast for added emphasis. In addition, they are very legible typefaces. Sans serif typefaces are usually not as effective when used as body type.

There are three exceptions to these guidelines regarding the use of sans serif type for the body text of a document. First, the text for technical information may look most appropriate when set in sans serif type. Second, there are a number of sans serif typeface designs that incorporate features that have traditionally been found exclusively in serif typefaces. For example, some sans serif type is designed with a wide range of stroke weight. Such typefaces do work very well when used for the body type of a document. Third, when you must use very small type, sans serif reproduces better because the simple strokes don't fuse or clog as easily as serif type.

Optima

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Optima is an example of a new breed of sans serif typeface that incorporates features that have traditionally been found exclusively in serif type.

Line length and readability

Readers are human beings. Human beings avoid work, especially tedious work, whenever possible. If readers encounter text that either looks like too much work to read or text that strains the eyes when read, human nature may prompt them to move on and leave the message unread. A major factor in making text look like less work, and thus more readable, is the line length you present to your readers.

The concept of line length is relative to the size of the type being used. A four-inch line of text set in 14-point type may have an ideal line length. Another four-inch line set in 9-point type may be too long.

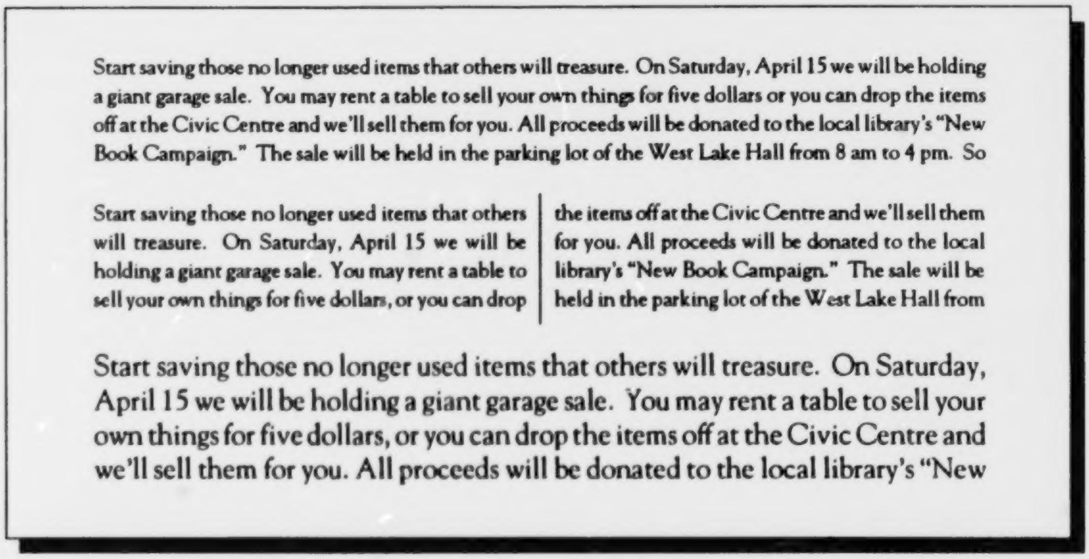
Long lines look like a lot of work and since the eye is inherently lazy, shorter lines increase the chances of the text being read. In addition, long lines can cause interference during reading. The eye is distracted by the words in lines above and below the one being read. Long lines also make the return sweep to the beginning of the next line difficult. Have you ever found your eyes consistently skipping a line or re-reading the same line when going through a book or magazine? That's a good indication that the lines were too long for the size of type being used.

> Start saving those no longer used items that others will treasure. On Saturday, April 15 we will be holding a giant garage sale. You may rent a table to sell your own things for five dollars, or you can drop the items off at the Civic Centre and we'll sell them for you. All proceeds will be donated to the local library's "New Book Campaign." The sale will be held in the parking lot of the West Lake Hall from 8 am to 4 pm. So dust off that old forgotten stuff in the basement and sell it for a good cause. Most importantly, come out and support the library's drive for new books. The main area of need for these new books is in the children's department. The library has not been able to purchase any children's books for the last three years due

Lines that are too long look like a lot of work. Many readers would look at this passage and simply move on. And even if you do read it, the long lines make reading difficult. The lines above and below the one you are reading cause interference as your eyes move.

There are no sure-fire formulas for determining line length. As a general rule, your lines should be 40 to 60 characters or 8 to 12 words long. There are, of course, many factors that determine how long your lines will be and the size of type that you must use. For example, you may be constrained by the budget of your customer. This may force you to use a much smaller type size so that more text can be shoe-horned onto the page. There are three strategies you can employ in such situations to make the text more readable. If the type must be small with long lines, try increasing the leading to minimize the interference and facilitate the return sweeps.

Another strategy is to break the text into two or more columns. The shorter lines of columns can actually make the same amount of text look like less work to read. Finally, if you have the freedom to make the document a little longer, you can increase the size of the type.



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Making long lines readable is not an easy task, but there are at least two adjustments that can be made to facilitate reading. The first is to increase the leading so that individual lines of text are more distinct. The second is to break the text into columns. Of course, making the text larger will shorten the lines and make them easier to read, but often you don't have the space.

Even with the optimum length of line, typefaces with a large x-height can still cause reading problems due to visual distraction and return sweep disorientation. The reason is the decreased white space between the base line of a line of type and the x-line of the line that follows. Typefaces with smaller x-heights create an adequate white space between the lines of type. Typefaces with large x-heights make the lines of text appear much closer together. You may have to increase the leading to maximize readability.

Justification and readability

The alignment of type between the margins is called the justification of the text. There are four possibilities. The beginning of each line of text can be aligned along the left margin with the right end of the each line determined either by the last whole word or whole syllable that will fit without extending beyond the right margin. This produces a clean straight left edge to blocks of text with an irregular edge on the right. This is called left justified or ragged right text. Text can be aligned in exactly the opposite way to left justification. In this scheme, the endings of each line are aligned along the right margin with the left end of the lines being determined by the same method of fitting whole words or syllables on the line. This produces a clean straight right edge to blocks of text with an irregular edge on the left. This is called right justified or ragged left text.

Text can also be centered between the margins so that any white space left over after the last whole word or syllable on a line is divided in half and placed at either end of the line. This creates perfectly balanced blocks of text that have irregular edges on both sides. It is called center justified text. The text can also be aligned along the left margin as in left justified text but expanded so that the ends of the lines align exactly with the right margin. This creates perfectly balanced blocks of text that have clean straight edges on either side. This is called justified or full justified text. To achieve this kind of justification spaces are added between words or characters to expand the line to fit perfectly between both the left and right margins.

Left justified or ragged right

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Right justified or ragged left

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Center justified

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Justified or full justified

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Justification means how the type is aligned to the margins. Here, the margins, which are usually invisible, have been indicated with a dashed line so you can see the effect created by the four types of justification.

Justifying for readability

Now that you know the four types of justification, let's evaluate the effect of text alignment on reading. Which type of alignment is most readable?

Readers need an easily found beginning for lines of text for speed of reading. This becomes especially important with longer passages. Try reading the following two passages.

Right justified or ragged left

The theme "Springing into Summer" provides the focus for this year's
fashion show at the Spring Festival. A number of committees are busy
planning and preparing for this new event under the direction of co-con-
veners Lonny Mason and Susan Brown. This year the fashion show will be
combined with a dinner so that you can make a relaxing and enjoyable

Center justified

The theme "Springing into Summer" provides the focus for this year's
fashion show at the Spring Festival. A number of committees are busy
planning and preparing for this new event under the direction of co-con-
veners Lonny Mason and Susan Brown. This year the fashion show will be
combined with a dinner so that you can make a relaxing and enjoyable

A clean straight left edge is required for reading long passages of text. Just look at these two passages. Would you like to read a whole book that was right or center justified?

You will quickly see that an irregular left edge to a block of text is much more difficult to read. This disqualifies right justified and center justified text as candidates for easy reading. Left justified and full justified text are still in the running since they both align the text along the left margin.

From the previous discussion on readability, you know that readable text must minimize the fixations of the reader's eye and maximize continuous movement. To do this typographers design typefaces that minimize the white space in the type because the eye tends to be drawn to and stop on areas of high contrast. The added spacing in full justified text works against the efforts of the typographer. The increased white space creates more contrast and forces the eye to stop and jump its way through the text. Reading slows and eye fatigue increases. To make matters worse, the spacing created by full justification is irregular. This becomes increasingly the case as the column of text that is full justified becomes narrower. Such irregular spacing only increases the stops and jumps in reading.

The theme "Springing into Summer" provides the focus for this year's fashion show at the Spring Festival. A number of committees are busy planning and preparing for this new event under the direction of co-conveners Lonny Mason and Susan Brown. This year the fashion show will be combined with a dinner so that you can make a relaxing and enjoyable evening of the event. The dinner will showcase the talents and achievements of our hard working

The theme "Springing into Summer" provides the focus for this year's fashion show at the Spring Festival. A number of committees are busy planning and preparing for this new event under the direction of co-conveners Lonny Mason and Susan Brown. This year the fashion show will be combined with a dinner so that you can make a relaxing and enjoyable evening of the event. The dinner will showcase the talents and achievements

Full justified text can contribute to a lifeless look. More importantly, it can be hard to read. Left justified text has a more visually interesting outline. This, combined with the regular word spacing for ease of reading, makes left justification the best way to align the text in most documents.

Furthermore, the white spaces in several lines of full justified text often join together to form "rivers" of white that run vertically or diagonally down the page. Besides being unsightly, these rivers distract the eye in reading. Full justified text also results in symmetrical balanced blocks of text. You will remember that in the discussion of the principles of graphic design that symmetrical balance tends to be static and lifeless.

Irregular word spacing and "rivers"

The theme "Spring into Summer" provides the focus this year for the fashion show at the Spring Fair. The committees are busy planning for the fair under the direction of Lonny Mason and Susan Brown. This year the fashion show will be combined with a dinner so that you can make a relaxing and enjoy-

Regular word spacing

The theme "Spring into Summer" provides the focus this year for the fashion show at the Spring Fair. The committees are busy planning for the fair under the direction of Lonny Mason and Susan Brown. This year the fashion show will be combined with a dinner so that you can make a relaxing and

Narrow justified columns can result in "rivers" of white that draw the eye down the page. Just squint as you look at the passage on the left and the rivers will become very apparent. The reader's eyes will be continually distracted by this white space. Left justifying the text solves this problem.

Left justified text, on the other hand, does not suffer from any of the drawbacks of full justified text. The spacing between characters and words is uniform; therefore, left justified text does not work against the design efforts of the typographer.

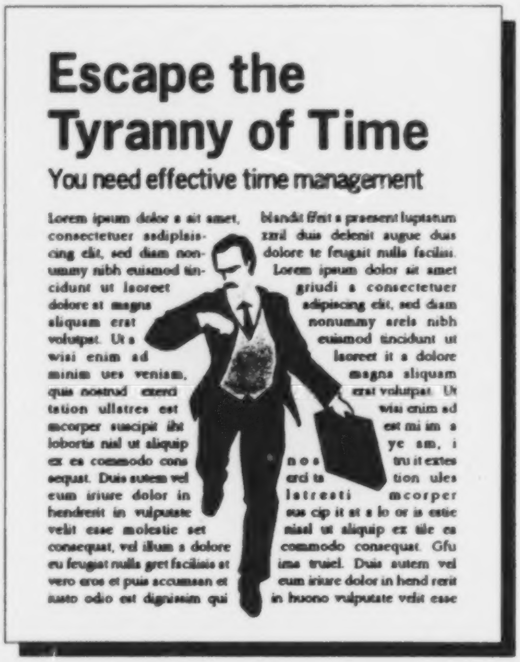
Left justification has an irregular right edge that gives a more interesting appearance. The irregular line endings actually help the reader to find the correct line in the return sweep.

Traditionally, typesetters have used fully justified text for many documents, paying careful attention to character spacing. Therefore, full justification may be the standard in the minds of your readers. Furthermore, left justification creates a less formal look that may be inappropriate for certain publications. Nevertheless, while full justified text may support the message of certain kinds of documents, for the reasons just discussed, left justified text is recommended for many publications, especially when the text must be set in narrow columns.

Run around text and readability

Run around text is type that has been made to follow the irregular shape of a graphic as it flows down the page. You can see an example below. Once, it was difficult to do, but now desktop publishing programs have automated the process of running text around graphics. In fact, it has become so easy to do that it is a frequently used technique.

With desktop publishing tools, run around text is now an easily done technique. The question is, "How often should you use it?"



Escape the Tyranny of Time

You need effective time management

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While run around text is effective for catching the eye, it is difficult to read. Take a look at the example above. Now imagine having to read several pages with run around text. It wouldn't be easy!

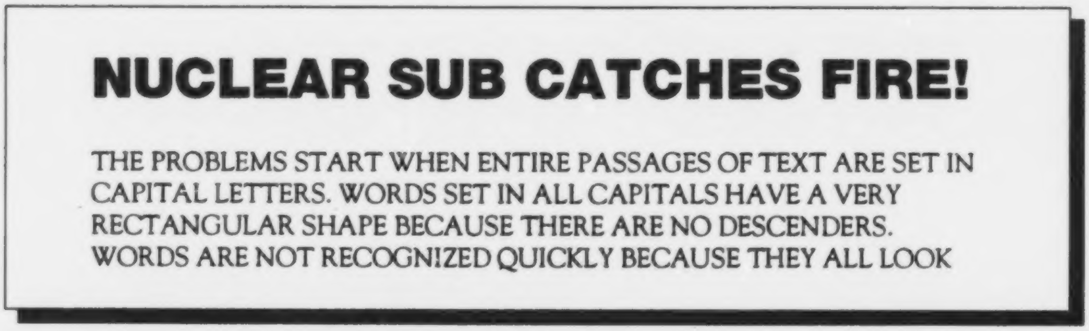
When should you use run around text? Treat this technique like you would a powerful spice in cooking. It can be very effective if it used sparingly. In addition, there are ways to use run around text that minimize the negative effect on reading.

Take another look at this example of run around text. The column on the left is much easier to read than the column on the right. The reason for this is that the run around is on the right where the eye is used to an irregular outline to the text. The column on the right is difficult to read because the run around destroys the straight left edge of the text that is required for the return sweep.

If you are going to use run around text, put the graphic on the right to maximize the readability of the text. Also consider placing the run around low on the page or in the right hand column so that it is encountered after the content has created enough interest for the reader to persevere through the text.

Capital letters and readability

Readers associate importance with type set in all capital or uppercase characters. Capital letters are larger than lowercase and seem to demand the reader's attention. For this reason, capitals are widely used for titles, headlines, and other lead-ins. Single lines of all capital characters can be very effective in communicating important messages. But there are a number of problems with the indiscriminate use of capital letters, especially in multi-line passages.

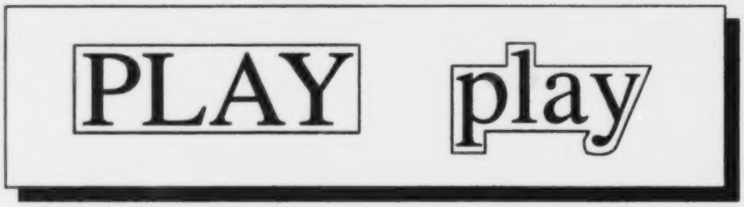


NUCLEAR SUB CATCHES FIRE!

THE PROBLEMS START WHEN ENTIRE PASSAGES OF TEXT ARE SET IN CAPITAL LETTERS. WORDS SET IN ALL CAPITALS HAVE A VERY RECTANGULAR SHAPE BECAUSE THERE ARE NO DESCENDERS. WORDS ARE NOT RECOGNIZED QUICKLY BECAUSE THEY ALL LOOK

Capital letters look important. They are ideal for headlines. But the uniform rectangular shape of words set in all capitals makes reading difficult in multi-line passages of text.

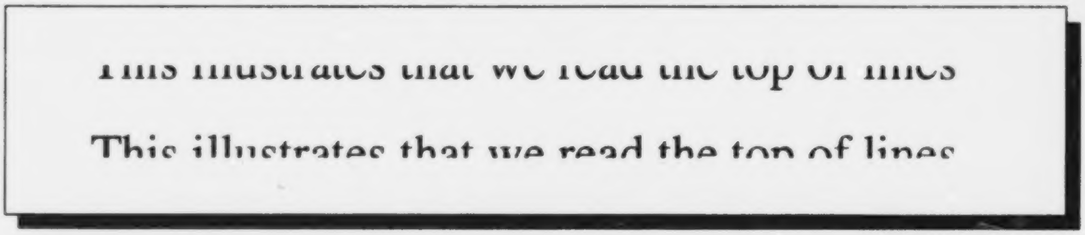
As mentioned previously, reading is based on recognizing words. The unique outline shape of whole words is as important to reading as the use of serifs to draw the eye easily from character to character. Words set in all capitals, however, have a very regular, rectangular shape because all of the characters extend to the cap line with no descenders. Words are not recognized as quickly because, initially, they all look the same. In addition to slowing reading, text set in all capitals has a monotonous, stagnant look. Lowercase type is much easier to read because the irregular outlines give words a unique and easily recognized shape. Lowercase characters are preferable over capitals for all but short lines of text that must convey important or urgent messages.



Words set in lowercase characters have unique irregular outlines. When you learn to read, you learn to recognize the shapes of words. For this reason, lowercase characters are much more readable than capitals.

What about initial capitals?

A common use of capital letters is to capitalize the first letter of every word in a title, headline, or similar line of text. This is also known as an up and down style of typesetting. While it may appear at first to be effective, it too hinders the reading process. The reason is that we read along the tops of words, not the bottoms. This can easily be seen by examining the following line of type that has been split in half.


This illustrates that we read the top of lines
This illustrates that we read the top of lines

Try reading these half-lines of type. You will quickly find that it is the tops of the characters that provide the bulk of the clues for word recognition.

The tops of the words provide many more clues for word recognition than the bottoms. Now keep this in mind when you look at the next two lines of type. The use of initial capitals serves only to break the flow along the tops of the words. Even for titles and headlines it is far better to capitalize the first word and use all lowercase characters for the rest.

This Has Been Typed With Up And Down Style
This has been typed with regular prose style

Some publishers have referred to this Up And Down style of typesetting as visual hiccupping because it forces the reader's eyes to bounce up and down along the top of the line as the text is read. While the Up And Down style is widely used, it is not recommended. Instead, use a regular prose style for headlines and lead-ins to enhance readability.

Type for emphasis and contrast

Long uninterrupted passages of text look like work. To make large amounts of textual material look more appealing, some contrast is needed to create visual interest. Emphasis placed on key points to draw the reader into the content will also add to the appeal. Specific page layout techniques for providing emphasis and contrast will be explored in detail in a later chapter. Here the focus is on the characteristics of type that support these important ingredients in successful design.

Emphasis and contrast in lead-ins

Lines of type that are distinct from the body text are sometimes referred to as break lines, for no other reason than they give the reader a break from the tiresome task of reading long passages. They are more commonly known as lead-in lines because they are designed to get the reader's attention and lead the reader into the document's body text. Such lines can be used to provide both contrast and emphasis. Here are some guidelines for selecting the type for lead-in lines:

- Make the type larger. This is the simplest and most obvious way to get a reader's attention and emphasize a point. Don't forget the principles of proportion and telescoping. Don't overwhelm the body text. Also, the larger you make the type, the more white space will be needed around the line to prevent an over-crowded look.

Large headlines
get attention

- Use a different typeface. A common strategy is to use sans serif type for the lead-in lines and serif type for the body text. Remember, to maintain typographical unity, do not use more than two different typeface families on a page.

Serif type can be used for headlines and lead-ins, but never use two different serif typefaces on the same page. The reader may not know what is wrong, but they'll notice a problem.

Sans serif typeface for headlines

Use sans serif type for lead-ins and serif type for body text

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- Use type with heavier stroke weights to add emphasis to important points. The heavier the stroke weight, the more white space needed to avoid a cramped look and to provide the contrast required to catch the reader's eye.

Heavy stroke weight adds emphasis

Heavy stroke weight adds emphasis

Heavy stroke weight adds emphasis

- Use italic text to provide contrast and give a feeling of motion to points. Italics can also be used to add mild emphasis to points. Keep italicized lines short to enhance readability. Also use italics for titles of books, software titles, periodicals, and so on, instead of underlining.

Italics convey a feeling of motion

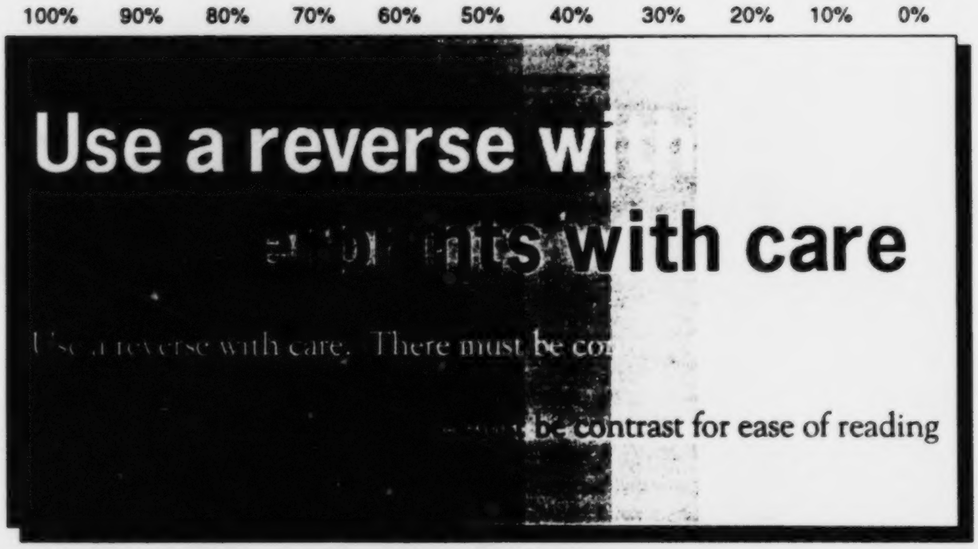
- Use capitals to add importance to short lines of type. If importance must be added to longer lines, it is better to use lowercase characters with a larger size and heavier stroke weight. Some uppercase characters create awkward-looking white spaces when they are placed beside other characters. Character pairs like *AW*, *AV*, *AY*, *Ya*, and *Te* are some examples. This awkward look becomes more apparent when you use large point sizes in headlines and other lead-ins. The characters

WE DECLARE WAR!
WE DECLARE WAR!

Certain capital character combinations can create awkward looking white spaces between the letters. Look at the word "WAR" in the top line. Eliminating this unsightly white space is called kerning. Kerning has been done in the bottom line for a more pleasing look.

should be brought closer together so that the spacing is more visually appropriate. This is called kerning the characters. In the topmost headline, above, notice that the *W* and the *A* in the word "WAR" appear too far apart in the top line. In the second line the characters have been kerned to reduce the white space. You should always look for unsightly white spaces in the large type you use in headlines.

- Use overprints or reverse type on a screened background. You must exercise care when using overprints to ensure that there is sufficient contrast between the shade of the text and the background. This contrast is essential for the legibility and readability of the type. The effect of both white and black type on various shades of background is illustrated below. Notice that the type becomes increasingly unreadable as the contrast decreases. You will also see that smaller type requires more contrast than larger type for good readability. To avoid a cramped look when overprinting type, don't place the type too close to any edge of the background.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Use a reverse wi
nts with care
Use a reverse with care. There must be co
be contrast for ease of reading

The key to successful reverses and overprints is lots of contrast.

BEST COPY AVAILABLE

You must be especially careful with light backgrounds. Screens that look acceptable when printed on a 300 dots-per-inch laser printer may completely disappear when printed on a 1200 to 2500 dots-per-inch Linotronic printer because the dots are so small they are absorbed by the paper. Also, many photocopiers will not pick up light screens and consequently, the background is missing on the reproduced document.

- Use a typeface with a large x-height to create the illusion of a large size. The x-height of a typeface determines its visual size. Visual size is quite different from the point size of the type. Point size is an objective measure from the cap line to the descender line. The visual size is a subjective quality, and it refers to how large the type appears to the eye. You can get a good idea of the difference between the point size and the visual size of type by examining the two lines of type below. Which one of these lines looks larger?

Avant Garde

What determines the visual size of type.

Times

What determines the visual size of type.

Are you surprised to learn that both of these lines are exactly the same point size? The difference is that Avant Garde type has a much larger x-height than Times type. The visual size of type can be exploited when you must catch the reader's eye, but you don't have very much space to do it. By selecting a typeface with a large x-height you can make a headline appear much larger than the rest of the type on the page.

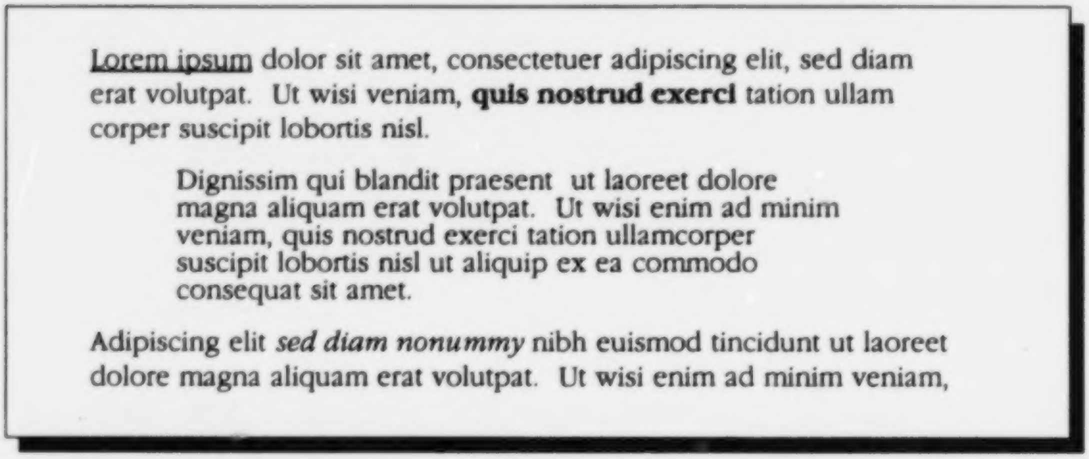
- Use a different color for headlines and lead-ins. Color can make type difficult to read. As with overprints you must ensure that there is enough contrast between the type and the paper. Also, be careful not to use too many different colors. When used appropriately color can assist the reader to find relevant information. For a unified design remember to use the same color for lines with a similar function in the document.

Adding emphasis to body text

Your design has probably generated some interest in the content of a document by the time you have drawn the reader into reading the body text. Once you have the reader interested, you do not want to place anything in his or her way that will hinder the reading process. One of the most common mistakes that desktop publishers make is cluttering up the body text with contrasting items; don't!

However, some points must be emphasized for effect. Here are some suggestions for adding emphasis to body text:

- Use **bold** characters for strong emphasis. Bold type is excellent for emphasizing longer points because the basic shape of the characters is not altered. Thus, the type is still readable.
- Use *italics* for mild emphasis. Italic characters are not as readable as the roman version of the type and should be kept to a maximum of ten to twelve words.
- Use underlining to highlight key words or phrases. Underlining is not widely used. It is not recommended for anything more than single words or short phrases. In fact, typesetters don't use underlining at all. The reason is that underlining destroys the descenders of characters. This has a significant impact on the readability of underlined type.
- Use narrower margins and reduce the leading for whole passages that must receive special attention, like quotations.



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Emphasis can be added to body text by making important points stand out as illustrated here. Any use of contrast, however, should be limited to ensure maximum impact.

Summary

Type is a very deceptive element of design. When it is functioning properly, it does not draw attention to itself, but rather, it becomes a transparent vehicle for meanings and ideas. To achieve this ideal state in a design, you must possess a reasonable understanding of the reading process and of how the attributes of type can be selected and manipulated for effect. If you apply the ideas contained in this chapter to your designs, readers will find the messages of your documents more immediately accessible and readable. Don't underestimate the role of type in the design of attractive and effective publications.

Chapter six

Principles of page layout

"The basics of design, knowing how to structure a page to get the information across, will always be important."

Wendy Richmond

Chapter six

Principles of page layout

Putting it all together

Page layout is applied design. You take what you know about communication, the principles of graphic design, and type and use that knowledge to produce useful documents.

Traditional page layout

Traditionally, page layout was done on a large table known as a layout board or paste-up board. High quality versions of the graphics and text to be placed on the page were produced from phototypesetters and cameras. A small roller was used to apply a small amount of wax to the back of each page item so that they would stick to the layout board. Trimming of items was done with a sharp knife. The layout artist would cut out the various items of graphics and text with the knife and paste them onto the page to communicate the message in an eye-catching, eye-pleasing format.

The process was relatively straightforward until changes had to be made. Moving and resizing items was time consuming and expensive. After a few moves the wax rendered an item unusable. If an item had to be enlarged or reduced, you had to go back to the typesetter or the camera and make a new block of text or graphic. You would also have to redo an item if it had been trimmed and now had to be enlarged. Adding new items to pages that had already been laid-out created even more problems. Often the only way to handle new material was to completely remove all of the items on the page and redesign it from scratch. All in all, it was not a pleasant endeavor!

Electronic page layout

The essential task of page layout has not changed in the era of desktop publishing. You must still place graphics and text on the page to communicate a message in an eye-catching, eye-pleasing format. The real change is in the flexibility of the tools that are used to accomplish the task. The "soft copy" of a document on a computer screen can be manipulated endlessly and in ways not even dreamed of only a few years ago. But even with the power and ease of use of these new desktop systems, the basic task of page layout has not changed.

Page layout is much more manageable than it first appears. In this section we will look at some guidelines that will assist in that process.

It is true that page layout covers a lot of territory. There are a great number of techniques that can be used to solve various publishing problems and to create specific effects when laying out a page. You will learn about these in the next chapter. However, you don't have to know all about the techniques covered in the last chapter of this book to produce functional documents. These techniques may help add some impact in certain situations, but they can be added to your layouts as you become more familiar with laying out a page. Don't make specific techniques the focus of your attention. Instead, focus on the principles that are outlined in this chapter and make them your goal. Relax, take your time, and let your work develop naturally as you go.

The principles of page layout

Like the principles of design, the principles of page layout must be viewed as suggestions. They are not rules. The guidelines provided here are flexible and any guidelines you develop for yourself must remain flexible, as well. In fact, you begin down the road to stagnant design as soon as you start to see page layout as a set of rules. The key to creating your own effective style for laying out a page is being willing to experiment.

While you should always be suspect of anything that declares itself as a principle, the six guidelines outlined here have some general applicability. They have come out of years of experimentation, great successes, and blazing failures. They will not guarantee effective layouts if followed to the letter, nor will they prevent you from experimenting to achieve greater impact for your message. They are simply a solid foundation from which you can build as you gain experience with page layout.

The six principles of page layout are: keep it simple, be consistent, make your message accessible, let the page breathe, design for your visual unit, and think three. Let's discuss each of these in detail.

Keep it simple

Let's say it just one more time: keep it simple. The goal is communication and in many cases the reader is an unwilling participant in this process. Even at the best of times the reader's eye and mind are inherently lazy. If the message of your document is to overcome the reader's natural aversion to read anything that looks like work, you must lay out your pages so the content is as easily accessible as possible. The key to success is simplicity of design.

"It is better to have a reader read *half* of what you wanted to say than *none* of all of it."

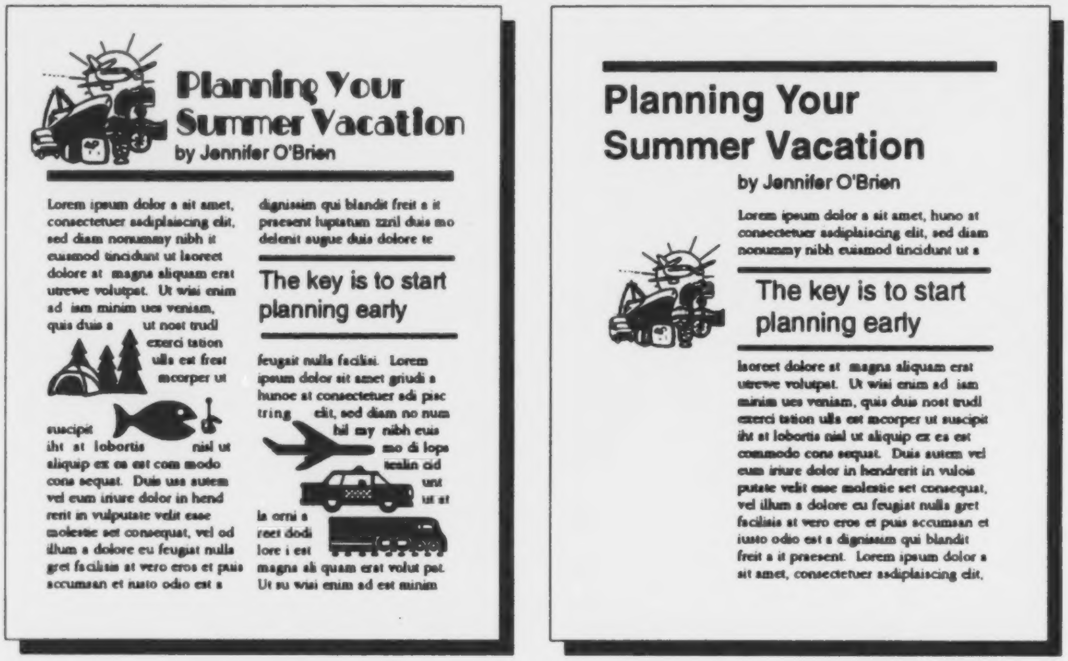
Words to publish by — you won't read wiser words regarding publishing than these. Burn them into your mind. They should form the foundation for your approach to creating every document you ever publish.

It is very easy to create visually confusing layouts. In fact, such designs usually result from very honorable intentions. The publisher is often so concerned with communicating a message that the presentation is an afterthought, especially if the publisher is also the author of the written text. Consequently, the reader is visually overwhelmed. The page may contain valuable information, but the sheer volume of content renders the message inaccessible to most readers.

There are two important steps to achieve simplicity of design. First, it is absolutely critical that you know the main thrust of the message a document is to communicate. Before you ever begin to take pencil in hand to rough out a layout, take as much time as you need so that you can state clearly the central message this document will convey. This knowledge enables you to make design decisions.

Second, steadfastly resist the temptation to include additional material in the document that will be interesting but will detract from your main goal: the communication of the central message in this publication. This can be painful, but you must be ruthless in eliminating unnecessary content from your document. One of the most common errors that desktop publishers make is trying to say too much all at once. The usual result is a cluttered page that is confusing to the reader.

Once you can state the main message of your document clearly and you have pared the content down as much as possible, you must lay out your page with singleness of purpose: to draw the reader into the message as quickly and efficiently as possible. If the page is cluttered, and the eye cannot easily find its way through the material, the reader will persevere only if there is a strong interest in the message. Less motivated readers will simply move on. With this in mind, you will find the simple layout is most often the effective layout.



Planning Your Summer Vacation

by Jennifer O'Brien

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Which one of these pages would you rather read? It is true that the page on the right doesn't contain as much info as the one on the left, but what would you rather have: pages that pack a lot of info or pages that get read? The key to the layout on the right is simplicity.

Be consistent

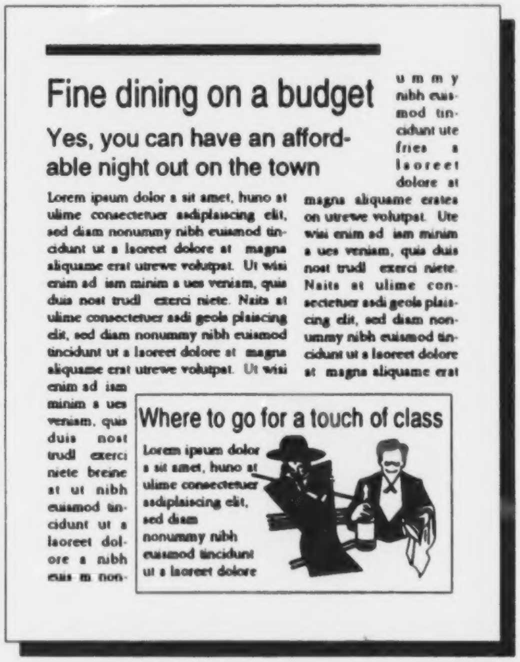
There are two ways to confuse your readers. You can confuse them with the document's content — the words and graphics you use to convey your message. You can also confuse readers with the visual layout of your pages. Readers will detect even the slightest inconsistency in your treatment of the various elements on the page. Such inconsistencies can range from minor irritations to major sources of confusion. As mentioned previously, once you confuse a reader, only the motivated continue. To ensure that your documents do not visually confuse your readers, you must be consistent in the way you treat text and graphics.

It is important to differentiate between consistency and uniformity. If all of the document's pages are uniform, they will create a predictable, monotonous, and boring visual effect. Good layouts create visual tension while treating similar elements in a consistent manner. This consistency makes it easier for the reader to move through the document. Consistency and good communication go hand in hand. Furthermore, as you develop consistent approaches to the various components of your documents, your own individual page layout style will naturally emerge.

Use a layout grid

The eye likes having items aligned on a page. Alignment gives the page order. It makes it easy for the reader to see which items are associated with each other. To achieve the alignment of items on the page, publishers use layout grids. Layout grids are a predetermined pattern of non-printing guidelines that are used to position text and graphics on the page. Even though they are not visible, the lines of the layout grid provide an underlying structure that organizes the page and provides consistency to documents.

Look at the sample page, below. The layout is confusing, isn't it? The lack of consistent alignment produces an irritating effect. The irregular placement creates roadblocks for the reader's eyes. It is also difficult to see the relationships between the various items on the page.



Fine dining on a budget

Yes, you can have an affordable night out on the town

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Where to go for a touch of class

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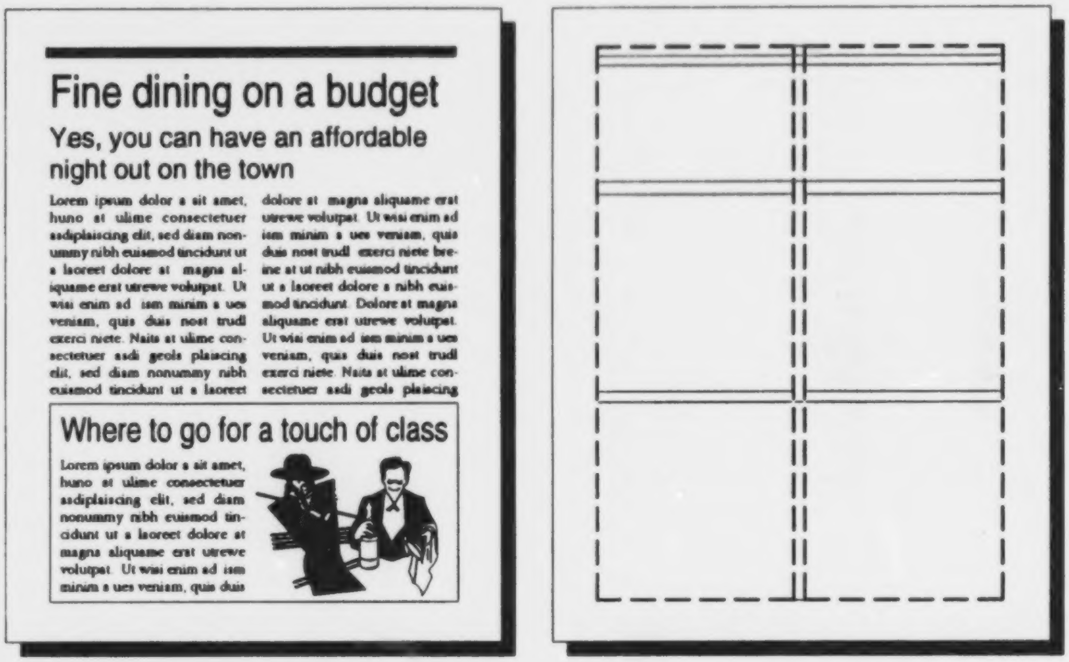
The problem with this page is the lack of structure to guide the placement of the text and graphics. The result is a confusing layout.

The irregular placement of items on the sample page above may appear somewhat exaggerated, but you will find lots of examples in desktop publishing that are as bad as this one, or worse. This page highlights one of the most common problems novice publishers have with their layouts — poor organization and poor eye flow stemming from a lack of consistency in the placement of page items.

Now consider the following realigned layout. Why is it so much easier to read? Why is the relationship between the various page items so obvious? The answer to both of these questions is that the text and graphics on this page were aligned with the



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Where to go for a touch of class

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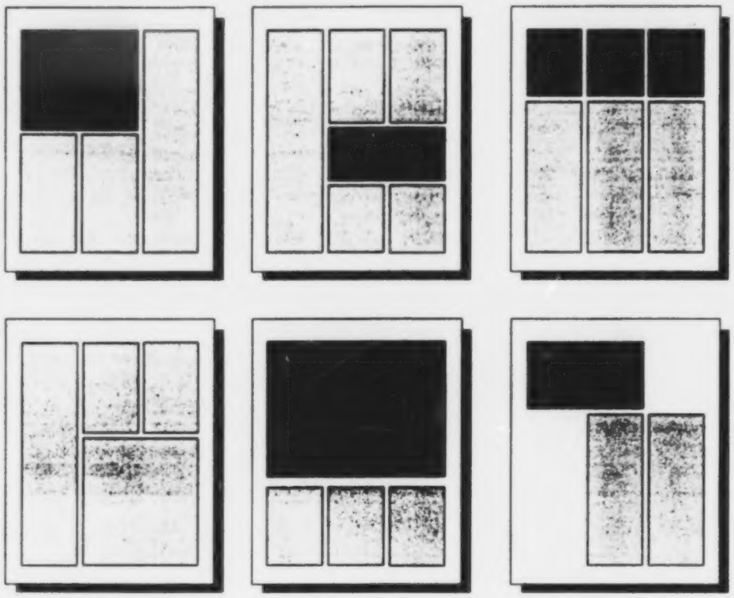
Here is a realigned version of the layout you saw on the previous page. It is constructed on a two-column layout grid which is shown in dashed lines on the right. The result is an organized appearance that greatly enhances the communication of the message. The shaded rectangles on the right show you how the items were aligned with the invisible layout grid lines.

invisible lines of a two-column layout grid. This underlying structure provides immediate visual organization to the material and significantly assists in the communication process.

Take a good look at how the layout grid is used. Notice that left and right sides of every item are aligned with one of the vertical grid lines. Also note that the items are not constrained to fit in a single column. Three of the objects run across both columns. The layout grid provides an underlying structure to a document, but the columns are not a straitjacket. In fact, you can create significant visual interest when you make some items on the page larger than single columns of the grid. The key is to always resize and align objects with the invisible grid lines no matter how many columns they span. Each item is not positioned so that it juts into a column without extending fully across to the next column guide.

This concept can be illustrated with a number of different layouts all based on the same layout grid. On the following page, you will see six possibilities for placing items in a three-column grid. You will quickly see that there are many possible configurations with just this one grid. The actual alignment of

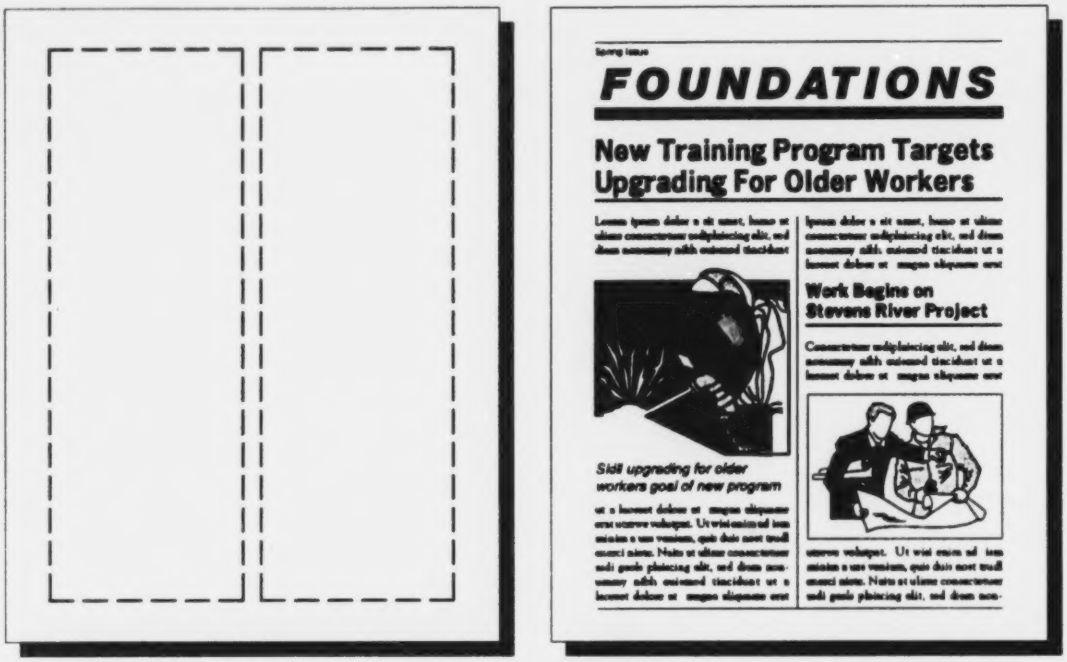


While layout grids give structure to documents by determining the alignment of page items, use of such grids still allows for considerable creativity in page design. Here are just six of the many possibilities for layouts based on a three-column grid.

the items on the page will be determined by the content of the various items and their relative importance.

There is one more point to remember when using a layout grid. To achieve the consistency needed to enhance communication, make sure that you use the same layout grid for every page of your document. Many novice publishers will use a different format for each page of a publication. Don't make this mistake. You can easily see from the previous examples that sticking with one grid still gives you lots of opportunity for variety in your layouts. All of these pages could appear in the same publication without being inconsistent.

- **Standard two- and three-column layout grids**
  There are many different layout grids that are used in page design. Each grid has its advantages and disadvantages. Some are designed only for specialized layout tasks like catalogues or advertisements. There are, however, two layout grids that are used significantly more often than the others. These grids are quite flexible and are widely used for newsletters, magazines, brochures, info sheets, flyers, and many other publications. The two layout grids used most often by publishers are the simple two- and three-column grids. Sample pages designed using these grids follow.

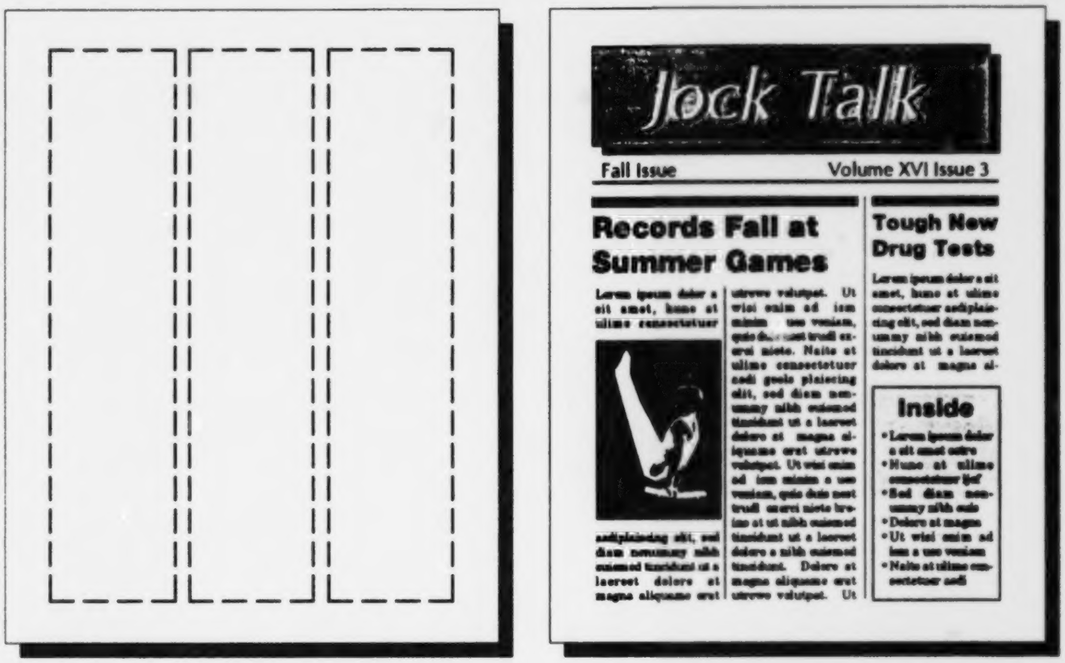

Spring Issue
FOUNDATIONS
New Training Program Targets Upgrading For Older Workers
Work Begins on Stevens River Project
Skill upgrading for older workers goal of new program

The two-column format is one of the most popular layout grids. It breaks text into easily read blocks and provides reasonable flexibility in the placement of page items.

The reason for the popularity of these grids is that they provide the best compromise between readable text and flexibility of page item placement. If the layout grid has more columns, you have more possibilities for the alignment of the various items to be placed on the page. Conversely, the problem with more columns is the effect on the readability of the text in the document. The lines of text must be set in a smaller point size to fit in the narrower columns. The difficulty of reading these smaller point sizes works against the benefits gained by having more flexibility in design.

The three-column grid provides you with more design flexibility than the two-column grid. Two of the three columns can be combined into a two thirds/one third format. This format is ideal for documents that will have major and minor articles. Pages using this variation of a three-column grid can be included with pages using a standard three-column format while still maintaining a consistent look.

As you progress in your page layout skills, you may want to experiment with layout structures other than the standard two- and three-column grids. The number and width of columns in the grid can be varied according to need. If one of these standard grids won't do just what you want, here are some other possibilities for you to consider.



This newsletter has been constructed on a standard three-column layout grid. This is probably the most popular format for newsletters in North America.

- **Asymmetrical two-column grid**

  Another popular layout grid is a variation of the standard two-column grid. In this layout, the right-hand column is enlarged horizontally to cover two thirds of the page or more. The narrow left hand column is used only for a few specific items. This leaves a wide left margin known as a scholar's margin, so named because such a margin traditionally provided room on the page for academics to annotate the content of a document.

  The scholar's margin has three main advantages in modern publishing. First, the section titles in the publication can extend out into the white space for ease of access. Second, the wide margin reduces the line length in the single column making the text more readable. Third, graphics that support the content of the document can be placed in the scholar's margin to add impact to the message.

  This format is excellent for technical documents and training materials. Normally, such documents contain so much information that the content is broken into subsections. Readers do not usually sit down to read a technical manual from cover to cover, but rather, they are looking for a specific subsection when they have a particular need. Having the subsection titles extend into the scholar's margin makes finding the relevant information much easier for this kind of reading.

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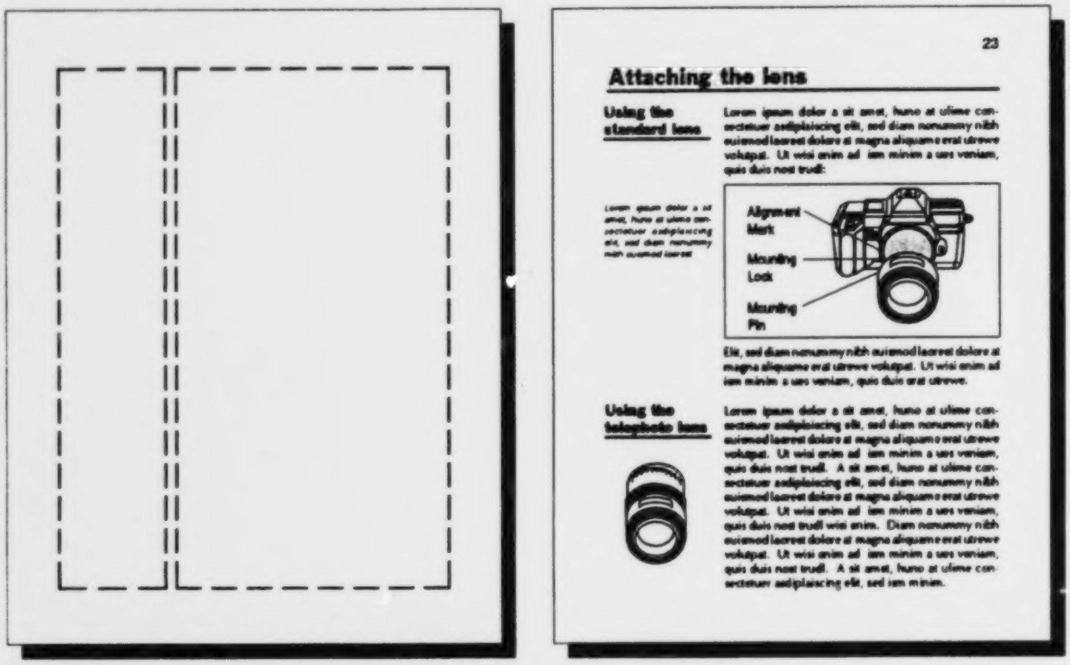


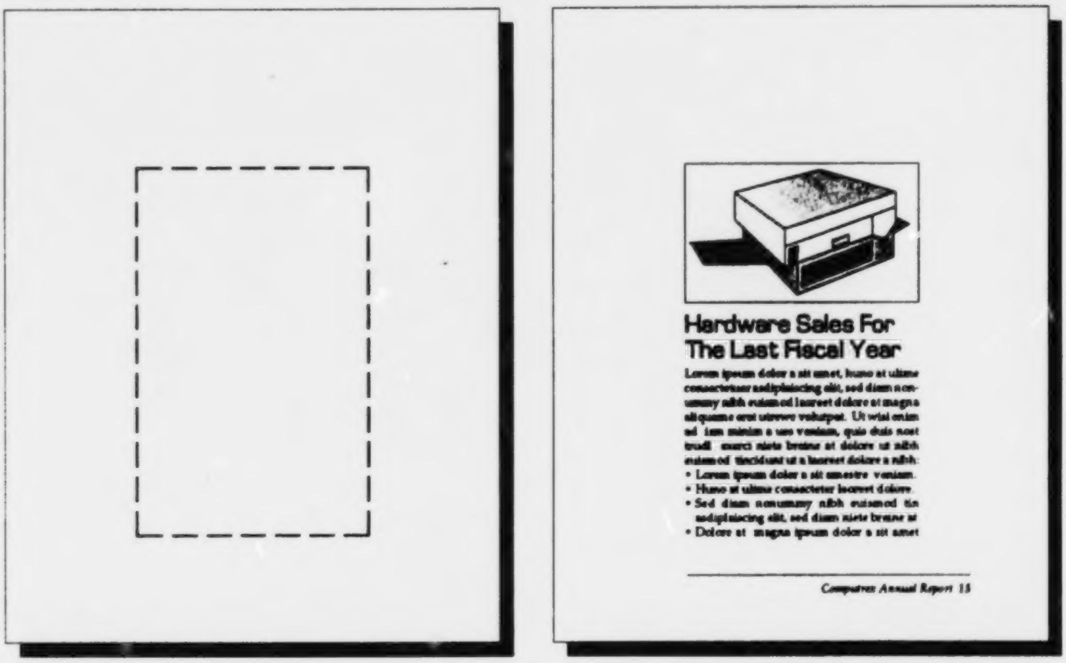
This variation of a two-column layout grid provides a narrow column on the left side of the page, called a scholar's margin. This grid is excellent for technical material because the section titles can be extended into the margin, and subsection titles can be placed entirely in the margin for easy access. Often supporting graphics and callouts are placed in the scholar's margin to add impact to the document.

- **Single-column grids**

  Single-column grids are often used by novice publishers because they seem to be so easy to do. While the simplicity of single column grids can be very effective in some documents, they are not as easy to work with as you might expect. There are two potential problems when using single-column grids.

  The first concern is the readability of the lines of text. Often the line length is too long in single columns and consequently, readability suffers. To ensure that you get an optimum line length, use wide left and right margins. Often, wide top and bottom margins are added to the layout to give a document a classy look. Such a document is the picture of simplicity. The white space will force the reader's eye to the text and graphics. The text is highly readable because the white space in the wide margins provides no distractions during reading, and the wide margins also yield an optimum line length.

  The second concern with a one-column grid is space. The reality of everyday publishing does not usually give you the luxury of using single-column grids because you simply can't get enough content on the page to produce an economical



Hardware Sales For The Last Fiscal Year

Computree Annual Report 15

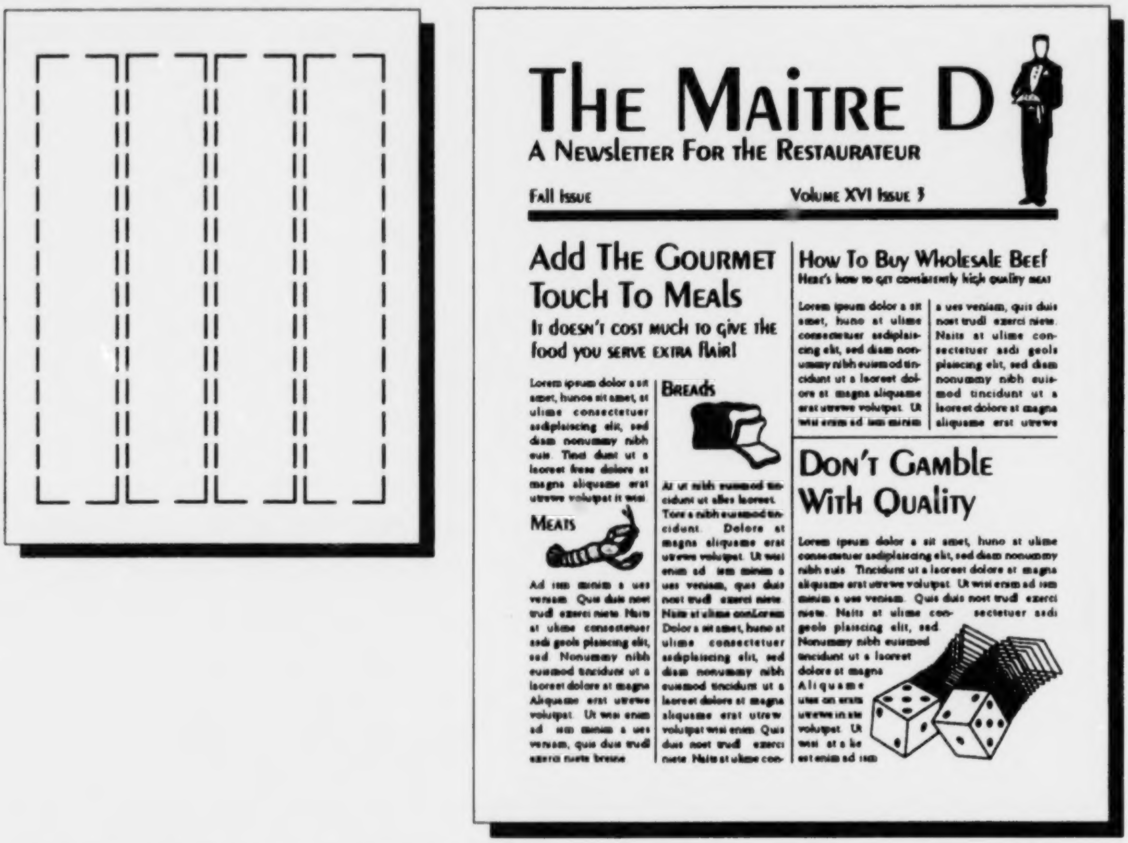
A single-column grid is the pinnacle of simplicity. When used with wide margins it gives a document a classy, elegant look. The lack of distracting items forces the reader to the content to be conveyed. If you can afford the luxury of such a layout, the single column format can be very effective in special documents that must convey a high quality image.

publication. For this reason, single-column formats are often reserved only for special documents. The annual report for a major corporation or an anthology of poems by a renowned poet may qualify for such a layout. Both documents benefit from the elegance created by a single-column grid.

- **Four-column grids**

  The four-column grid is often used for documents that must pack a lot of content on the page. This grid is particularly popular for newsletters and newspapers, especially when they are printed on the larger tabloid-sized paper (11 inches by 17 inches). The great advantage in using this grid is that you can place a lot of items on a single page. Four columns give you greater flexibility in alignment options for those items.

  The flexibility of a four-column grid, however, comes at a cost in terms of the readability of the type. This is a particular concern if a four-column grid has been selected for a document that will be printed on standard letter-sized paper (8.5 inches by 11 inches). To make four columns fit on a page of this size, the columns must be narrow. To have a reasonable line length in such narrow columns the type must be small. A rule of thumb is that type in a four-column layout should be no larger



THE MAITRE D

A Newsletter For the Restaurateur

Fall Issue

Volume XVI Issue 3

Add The Gourmet Touch To Meals

It doesn't cost much to give the food you serve extra flair!

Breads

Meats

How To Buy Wholesale Beef

Here's how to get consistently high quality meat

Don't Gamble With Quality

The four-column grid packs a lot of information on the page. It works well when the document is going to be printed on tabloid-sized paper (11 inches by 17 inches). The four-columns give lots of flexibility, but they also force you to keep the text quite small.

than 10 points in size. This could be a problem depending on the type of document you are producing and the audience you are targeting. A newsletter for a senior citizens association, for example, would suffer in a four-column format because the type would be too small for elderly people.

- **The catalogue grid**

  Catalogues present an interesting layout challenge. Each entry in a catalogue stands on its own, often without any direct connection to the other entries on a page. Catalogues also have many more items on a page than most other types of documents. Due to the sheer volume of information, the layout for a catalogue must emphasize organization so that the reader can easily access a specific entry.

  To address these special needs, a special type of grid has been used over the years. The catalogue grid is usually a modified two-, three-, or four-column grid where each column consists of

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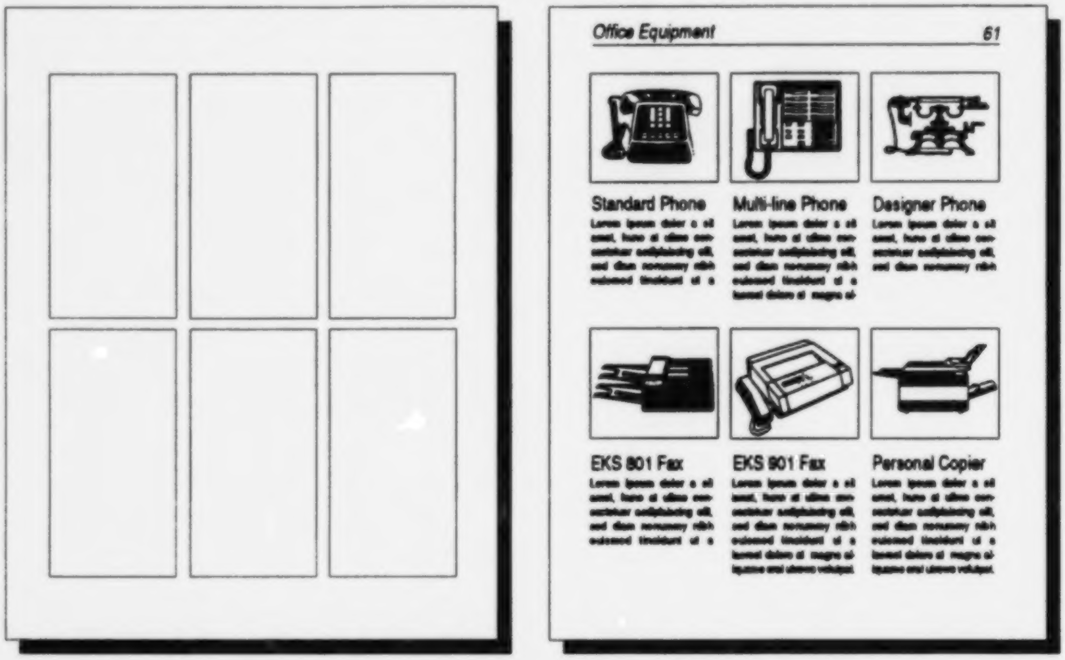
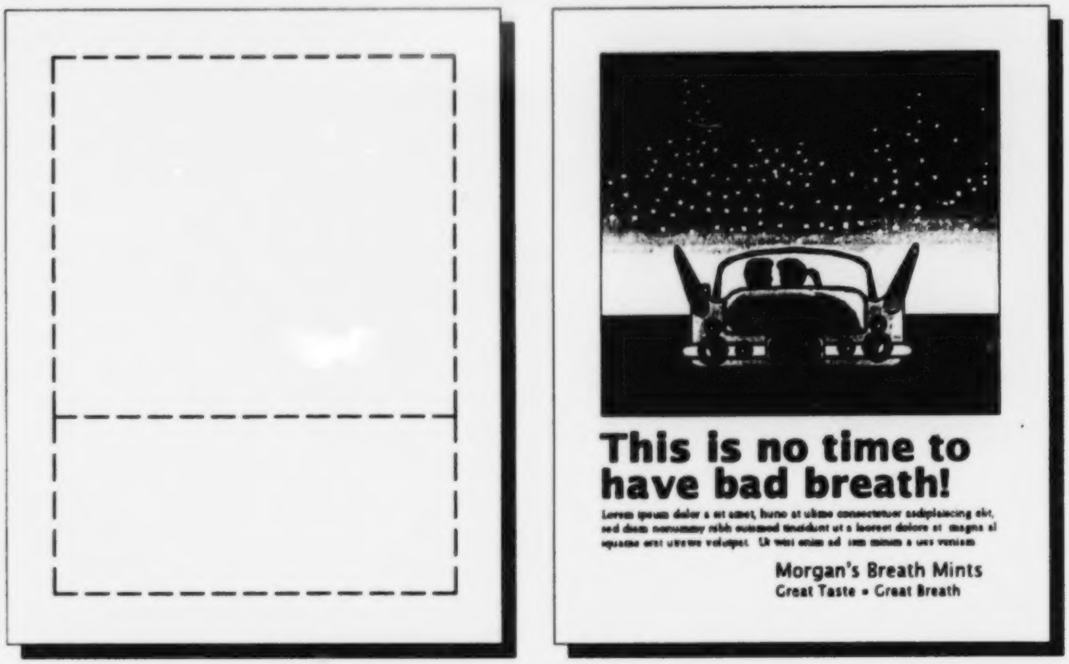


Catalogues and similar documents require a different kind of grid. This grid can be used to place a number of different items on the page. Here, two invisible guidelines have been used to align the beginning of each new entry in the catalogue so that the reader will be able to find a specific item quickly.

a number of rectangular item holders. The key to using this grid is to align the start of each new entry with the top of one of the item holders. The white space created by skipping down to the next item holder provides the visual separation needed to convey that the next item is an entirely new and possibly unrelated entry in the catalogue.

To bring more order to these kinds of documents, you can use two, three, or more horizontal guidelines to align the beginning of all new entries. These guidelines are not usually printed but simply used for alignment. Using this scheme gives the page a more organized look, and it also makes it much easier for the reader to access specific information because the start of all items is consistent.

- **An advertisement grid**
  Many different layout formats can be used for advertisements. Some ads use a newsletter format to convey their message, some capitalize on a predominantly blank page to direct the reader's eyes to the message, while others use a catalogue grid for placing information regarding a number of products. One layout grid, however, has become very popular for advertisements, especially those that cover an entire page. It is a single-column grid consisting of two horizontal panels. The large


This is no time to have bad breath!
Morgan's Breath Mints
Great Taste • Great Breath

While advertisements can take many forms, this grid has become very popular for many contemporary ads. Often the large panel covering 2/3rds of the page is placed at the top, although the grid also works just as well with the small panel at the top.

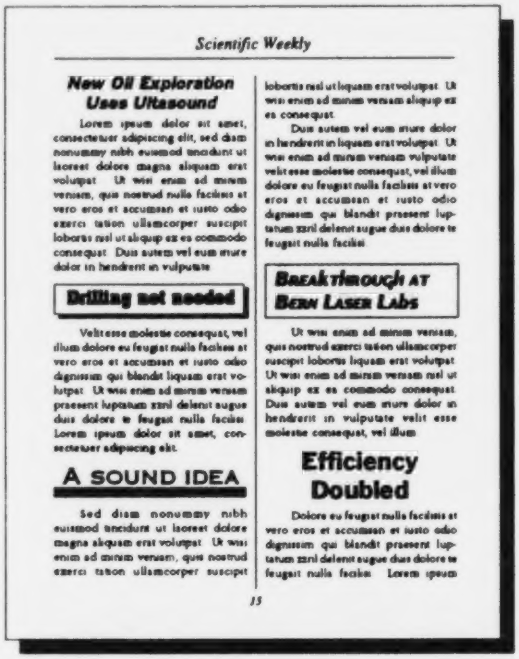
panel covers two thirds of the page and the smaller panel covers the other third. The large panel can be placed either at the top or the bottom of the page.

If the ad will not contain a lot of text, the large panel is placed at the top of the page. This panel is used for an eye-catching graphic or some large type with provocative content. The small panel is placed at the bottom of the page and is used to deliver the details of the message, as illustrated above. If the ad must contain more text, the grid can be reversed so that the small panel is placed at the top of the page. This allows a smaller graphic to be placed at the top of the page, freeing the large panel for the text of the ad.

Treat similar items consistently

Page elements like headlines, subheads, illustrations, captions, and others should have a consistent look, even if they are not identical in size, shape, or shade. This is especially important in longer publications where the visual effect of items is critical for the organization of the document. You want a consistent look to make the job of reading much more automatic for the members of your audience.

Consistency in appearance visually conveys the function of an item. Consider for a moment just the headlines and subheads for two articles on a single page of a newsletter. You have



Scientific Weekly

New Oil Exploration Uses Ultasound

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BREAKTHROUGH AT BERN LASER LABS

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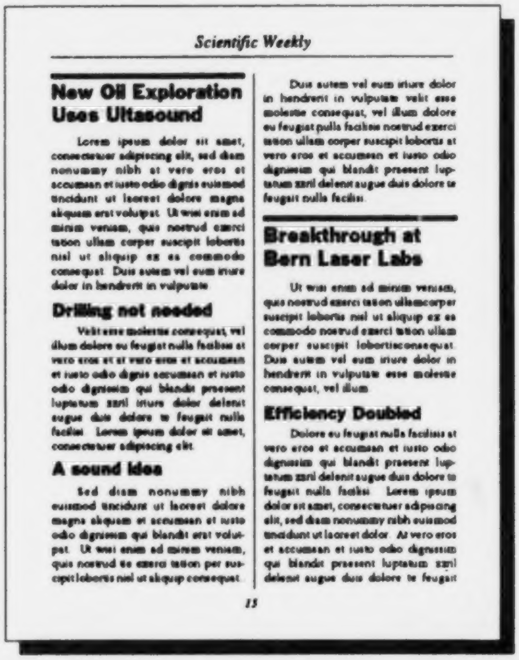

Scientific Weekly

New Oil Exploration Uses Ultasound

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Breakthrough at Bern Laser Labs

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Consistency facilitates the reading process. The inconsistent headlines and subheads on the left page make finding the start of a new article difficult. It's not easy, is it? The consistent treatment of the same items in the page on the right makes reading much easier.

started to read the first article, but realize that the content is not of interest. So you decide to skip to the beginning of the next article. With this is mind, examine the two pages, above. Which one makes the move to the new article the easiest?

The page on the left lacks coherence. It is visually confusing. The organization of the content is unclear, and it is difficult to determine where the articles start because there is no consistency in appearance of items with similar function.

The organization of the page on the right, however, is evident in just a glance. It is very easy to pick out the headlines and subheads and the relationships on the page without even reading the content of those lines. The reason is simply that items with similar function have been treated consistently.

Consistent treatment establishes a format for a document. It creates expectation in the reader. It develops a flow or rhythm in reading, especially longer documents. Consistency will also create a visual signature to your layout style as you begin to solve various publishing problems.

Please remember, however, that consistent treatment does not mean identical treatment. You always want variety in your documents to generate interest, and you can have it without

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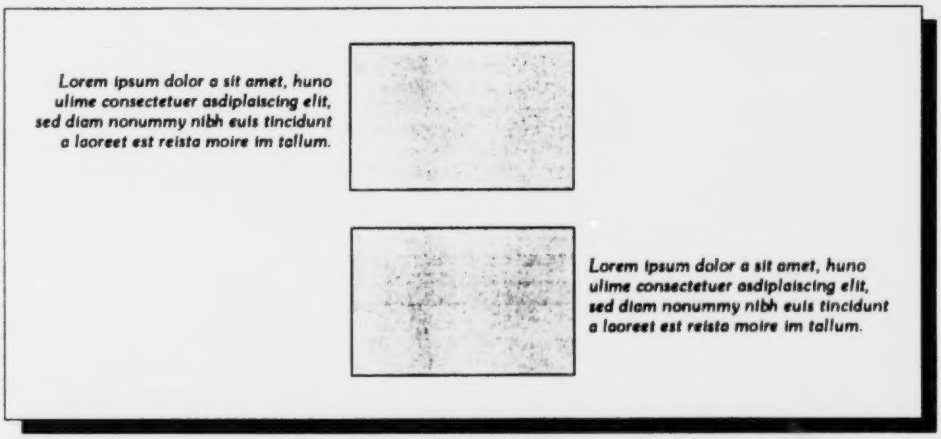

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The layout for these two captions could appear in the same document. While they are not identical, they are consistent in their layout. Consistency, not uniformity, should be the goal in laying out a page.

being inconsistent. Consider the consistency in the two examples of captions, above. Even though the captions are on opposite sides of the graphics they have a similar look. They both appear to be "attached" to the graphic they describe because the justification of the text has been changed. Since all the other aspects of the type are the same, the reader will easily recognize both of these items as captions.

Consistency in page layout has one additional benefit. The expectation that it develops in the reader can be exploited to give maximum impact to messages of special importance. By consciously breaking your own conventions, you can get the attention of your readers. There is, however, one major consideration to keep in mind when you deviate from the conventions you establish. Overuse of this technique will lessen the impact of the deviation and take away from the overall consistency of the rest of the document.

Make your message accessible

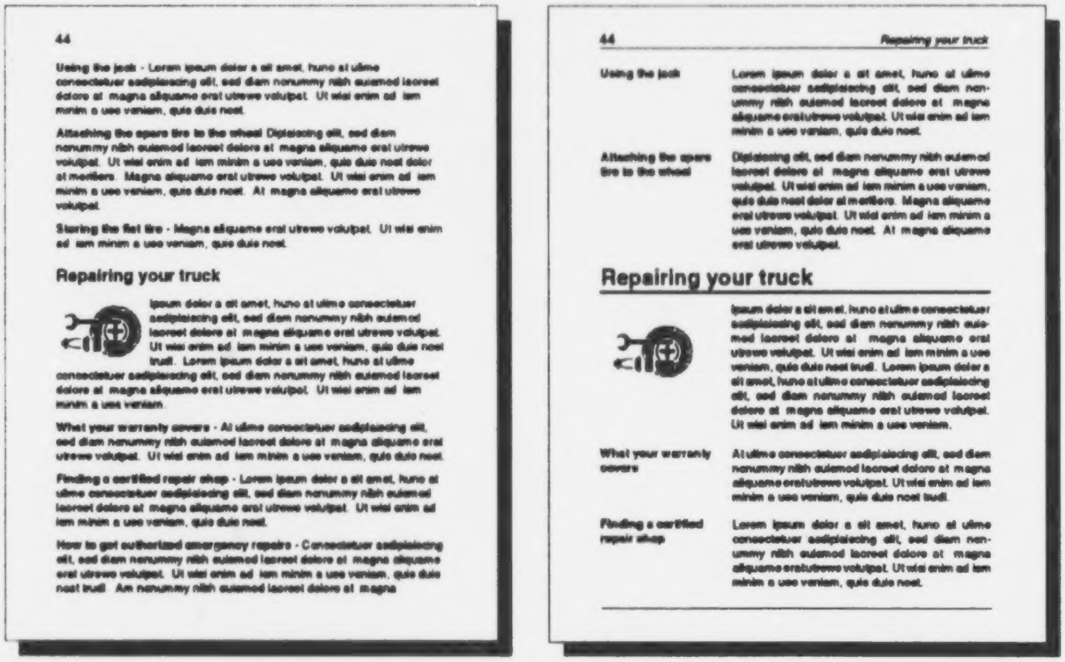
Different publications are read in different ways. You would rarely sit down and read a technical reference manual the way you would a fictional novel. The novel is read in its entirety, usually in long sessions done in a relaxed atmosphere. However, only specific parts of the technical manual will be read at any one time. In addition, these short sessions are often done by people in a hurry working under considerable pressure. Consequently, the layouts for each publication must be changed to meet the needs of the kind of reading that will be encountered. Therefore, it is important that you assess the kind of reading that a document must serve.

Get a handle on the situation

The majority of what is published in business and education is read by people under pressure. While they need specific information quickly, they are bombarded with so much information that it is often difficult for them to separate the wheat from the chaff. The layouts for documents that must function in such a high pressure, information-rich environment must make a message and its various subparts easily accessible.

The key to making a message accessible is the use of handles. Handles are visual references that identify parts of the content of a document. It is important to understand that making your message accessible with handles is not the same as promoting the content of a document. In making your message accessible, you are concerned with breaking the content into subsections and identifying those subsections to the reader. This facilitates quick retrieval of needed information.

Consider the following two layouts from the perspective of accessing information. Both pages are for an owner's manual for a pick-up truck. Assume that you need information regarding the repair of your new truck. Which format would you rather encounter? Why?


44
Using the jack
Attaching the spare tire to the wheel
Storing the flat tire
Repairing your truck
What your warranty covers
Finding a certified repair shop
How to get authorized emergency repairs
44
Repairing your truck
Using the jack
Attaching the spare tire to the wheel
Repairing your truck
What your warranty covers
Finding a certified repair shop

Proponents of the layout on the left will argue that the page packs more content. That content, however, is not easily accessed. The layout has not been based on an assessment of the kind of reading that will take place. It is inconsiderate to the reader's needs. The layout on the right recognizes that readers will need only specific pieces of information. This layout provides visual handles to facilitate the quick retrieval of information.

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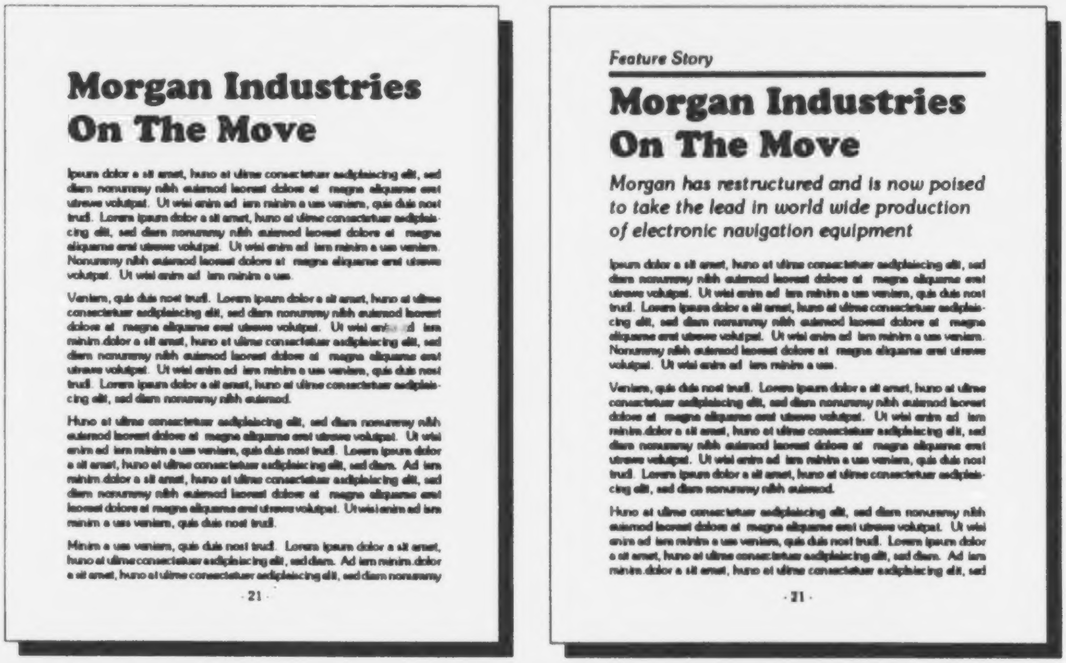
From the perspective of information retrieval, the design on the right is much more effective. The reason is that the easily found, easily read subheads placed in the scholar's margin make finding needed information much faster. The header at the top of the page also contributes to this retrieval process. The subheads and the header provide visual handles that let the reader's mind "grab" onto the parts of the document's content. Handles empower readers to make reading decisions by supporting the Skim step of reading. It is this concept of handles that is the essence of making your message accessible.

Technical manuals are not the only documents that benefit from having handles on their content. Newsletters, catalogues, magazines, books, in fact any document that may not be read completely from start to finish needs handles. Providing easily found clues for the location of the various subparts of a document is being considerate of your readers. People don't want to waste time if they need specific information.

Handles can take more than one form. The specific kinds of handles should be determined by the message to be conveyed and the kind of reading it will spawn. In the following two examples, you can see how a brief abstract gives the reader a handle on the content of an article without having to search for the relevance of the information. In this case the handle assists the reader in making the, "Should I read this?" decision.



Morgan Industries On The Move

- 21 -

Feature Story

Morgan Industries On The Move

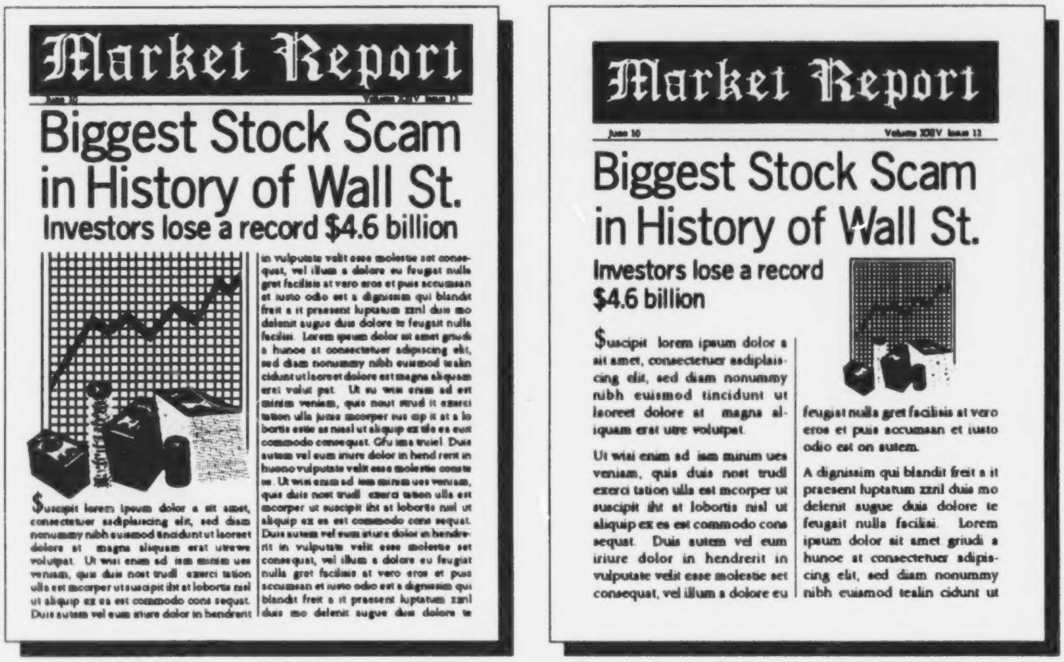
Morgan has restructured and is now poised to take the lead in world wide production of electronic navigation equipment

- 21 -

Handles on the content of a documents can take many forms. Here, a header and a brief abstract make the layout for the page on the right much more considerate of the reader who is looking for relevance.

Let the page breathe

One of the most common mistakes in page layout is caused by the "garbage compactor" view of publishing. This view dictates that white space must be eradicated at all costs. If you can shoe-horn an item onto the page, then do it. Many novice publishers hold to this view of publishing and their work can be easily spotted. Their pages pack a lot of content, like the page on the left, below. You might think that this is an exaggeration, but there are more examples of this kind of layout in desktop publishing than you can imagine.



Market Report

Biggest Stock Scam in History of Wall St.

Investors lose a record $4.6 billion

Market Report

June 10

Volume XXIV Issue 12

Biggest Stock Scam in History of Wall St.

Investors lose a record $4.6 billion

The page on the left is too crowded. It looks like work. Unless the reader is very interested in the content, the material on this page will likely remain unread because the layout is working against ease of access. You can make the same material look much more inviting by simply increasing the amount of white space on the page. Although there is less content, the reader is much more likely to read the page on the right simply because it looks like less work.

The problem with this kind of layout is that the material won't get read. The page simply looks like too much work. It's too crowded and confusing. The compression of the items required to make them all fit on the page yields a very "uptight" look. It does not foster easy reading.

The key to the success of the page on the right, above, is that the white space that lets the page breathe. By allowing the items some extra room the layout creates a much more relaxed

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look that says "read me." The increased white space increases the contrast on the page and creates more life.

When laying out your pages, remember those factors that will allow you to open up the format. You can use wider margins. You might even consider a wider top margin than the bottom margin for a very open and different look to the page. You can widen the alley between the columns in multi-column layouts. Be sure to give headlines and lead-ins lots of room. Also provide lots of room around graphics, subheads, or anything else that breaks up the body text. For the body text itself, increase the spacing after each paragraph to break the text up into more manageable blocks. You might also consider increasing the leading for the type if you have the luxury of increasing the length of your document.

There is, however, one type of publication that might not benefit from an opening up of the layout. An example of this kind of document is the authoritative report that has been published after several years of intensive research. This report might actually look better if the layout is tightened up. The fuller page will convey a sense of thoroughness that supports the publication's content. Most of the documents that you will publish, however, will function much more effectively if you open up your layout and let the page breathe.

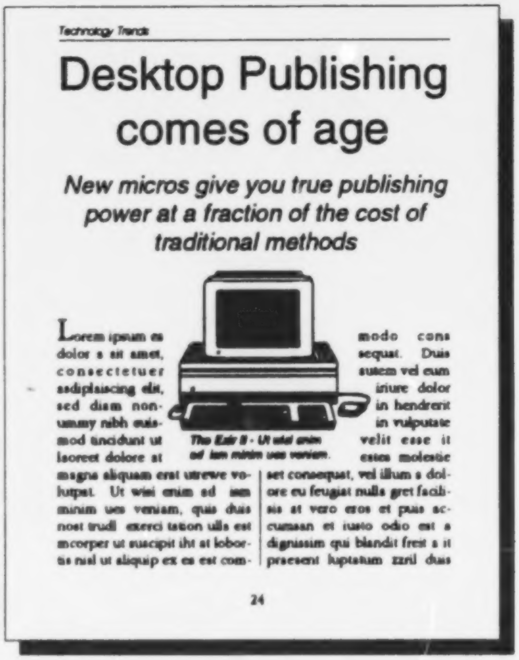
Design for the visual unit

Another common mistake made by novice publishers is that they forget that two open pages form one visual unit in multi-page documents. The visual unit is the area the reader's eyes will recognize as one connected, interrelated region. With the exception of newspapers, where the individual pages are large enough to form one visual unit, the reader will see two facing pages together as one distinct unit.

The person new to page layout will often design pages one at a time. While the pages may look good on their own, problems can arise when two pages are placed side by side in the printed and bound document. The layouts for the two pages may actually work against each other. The reader can become so confused from the two different layouts that information is missed or entire pages are skipped.

The problems associated with creating layouts without considering the visual unit can be easily demonstrated. The layouts for the following two sample pages were developed in isolation. Each page on its own has a reasonable layout that appears to function quite well in conveying its content.

The area the eyes recognize as one connected region is an important consideration when designing the layouts for pages. Here is a demonstration. These two pages have been designed independently, without considering the overall effect that will be produced when they are placed side by side in the finished document. Each individual page layout is reasonably functional. The message is communicated. Both layouts do an adequate job of placing page items for the visual unit of a single page.



Technology Trends

Desktop Publishing comes of age

New micros give you true publishing power at a fraction of the cost of traditional methods

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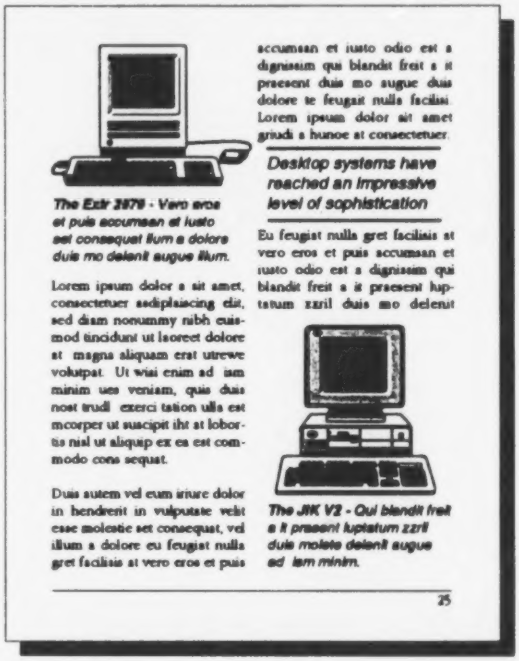

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Desktop systems have reached an impressive level of sophistication

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The JIK V2 - Qui blandit freit a it praesent luptatum zzril duis molete delenit augue ad iam minim.

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The problems start when the two layouts are placed side by side in the completed publication, as you can see on the following page. The eyes now take in the two pages together as one visual unit. Now the overall layout design lacks coherence. Eye movement is unnatural. In other words, the two layouts clash and communication of the message suffers.

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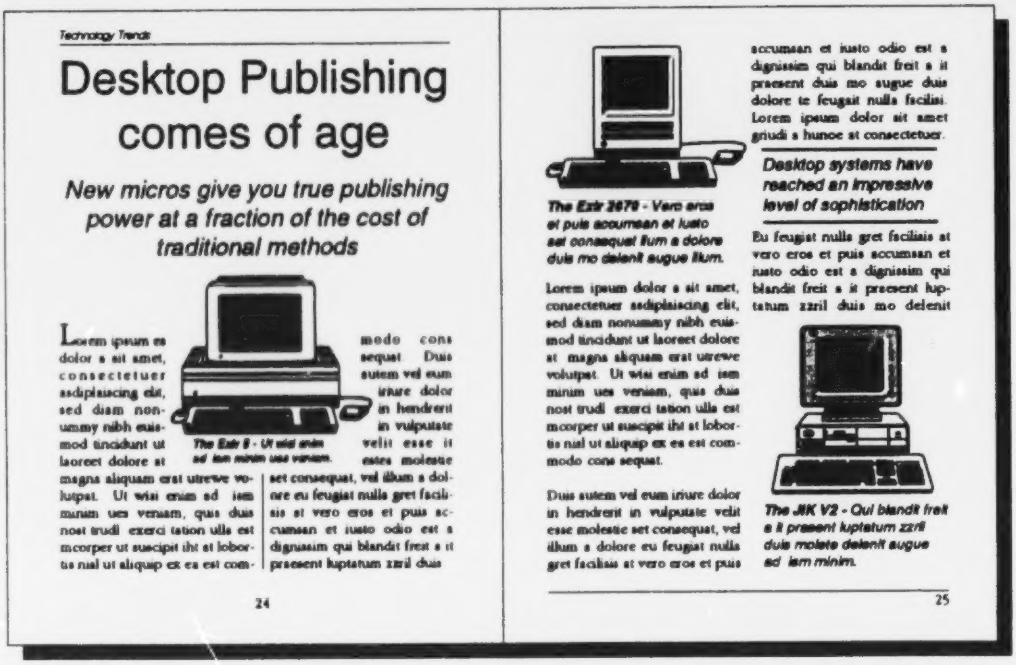

Technology Trends

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New micros give you true publishing power at a fraction of the cost of traditional methods

The Ezir II - Ut wisi enim ad ism minim ues veniam.

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Desktop systems have reached an impressive level of sophistication

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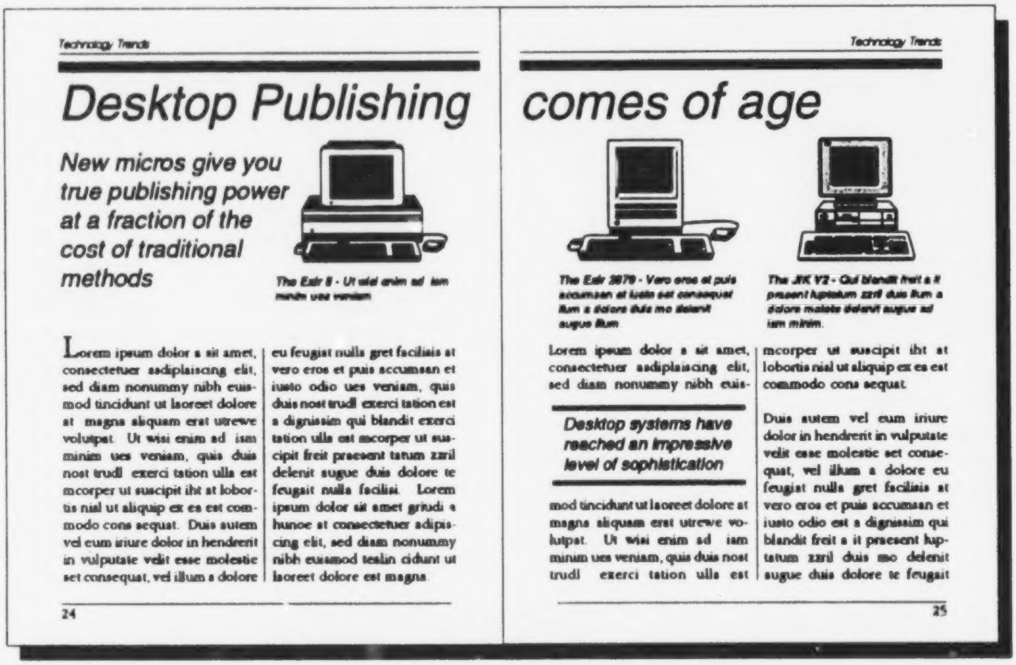
The two layouts from the previous page have now been placed together as they would be in a bound publication. Now the eyes take in both pages as one visual region. The layouts do not fit together very well because the true visual unit was not considered when the pages were designed.



Technology Trends

Desktop Publishing

New micros give you true publishing power at a fraction of the cost of traditional methods

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Technology Trends

comes of age

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Here, the pages have been redesigned taking the true visual unit into account. Now the pages look like they belong in the same document. The pages have an overall unity of design that enhances the communication of the message.

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Compare the two-page layouts on the previous page. You can see that pages that will face each other in a document must be designed together. This principle of designing for facing pages is an important one. Don't waste your good design work by creating incompatible pages in a single visual unit.

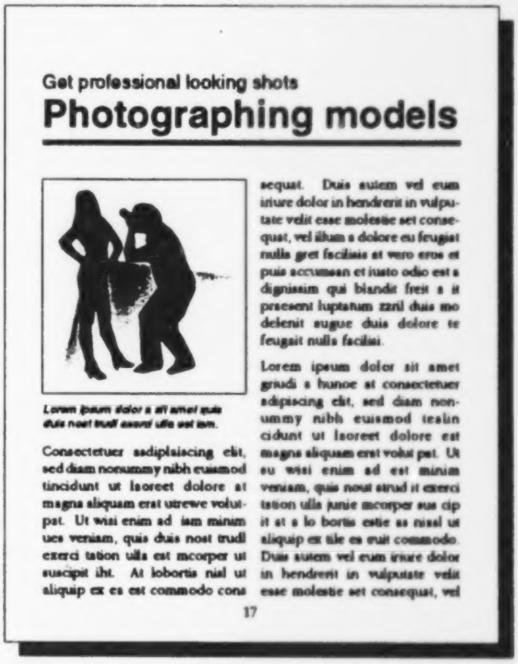
Think three

How many articles should you place on a page? How many photos on a page will produce an attractive layout? These can be perplexing questions if you are new to page design. While there are no hard and fast rules, there is one guideline that layout artists have found useful over the years: think three.

There is something pleasing about groupings of three items. For some reason the mind finds this number appealing. If you stop and think about it for a moment, you will discover many combinations of three in everyday life. Low, medium, and high, or red, white, and blue, or tribunals are just some examples. This is one reason that the three-column grid is such a popular layout grid. The number three just feels right.

You can add appeal to your pages by keeping this magic number in mind when you create your publications. Whenever possible, place items on the page in groups of three. Here are a few examples that show you how this can be done.

When a single article fills the entire page, try placing a headline, a graphic, and the body text as your three items. Note that the headline, kicker, and rule are treated as a single item.



Get professional looking shots

Photographing models

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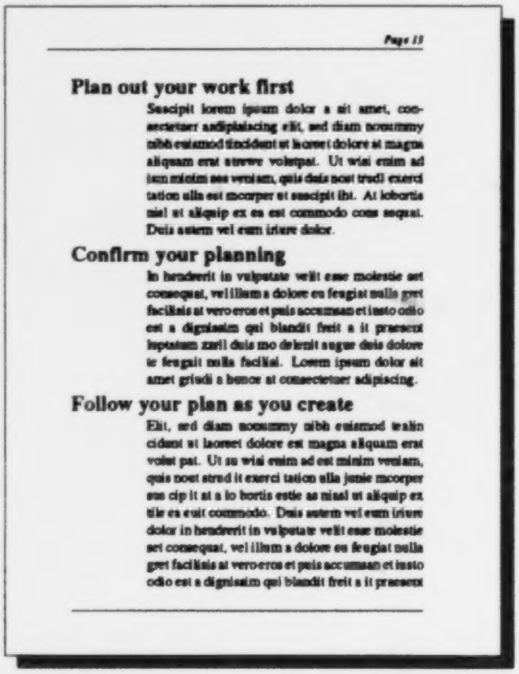
Here is a classic three item layout. It is effective in its simplicity and pleasing in its use of three major elements on the page.

Another approach to use when a single article fills the entire page is to place three subheads and three subsections of body text on the page. The subhead and its body text will be considered as a single-page item.



The three subsections on this page make it look complete. Although you may have to edit the body text to use this technique, it may be well worth the effort.

Page 11

Plan out your work first

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Confirm your planning

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Follow your plan as you create

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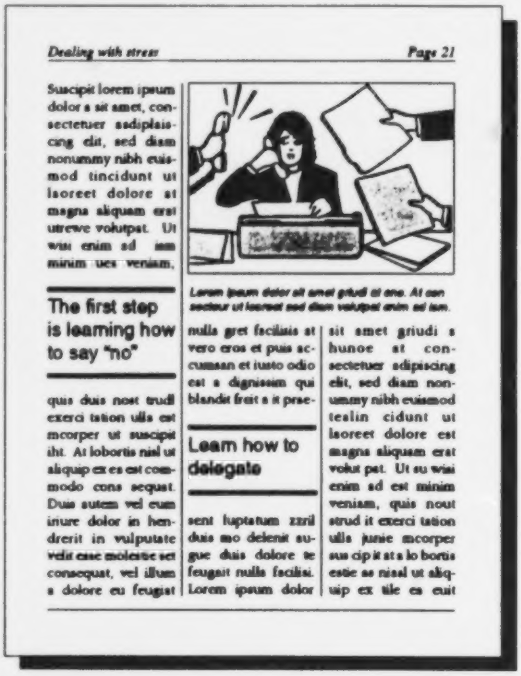
Yet another approach for pages containing a single article is to use three lead-in items. In this case, the body text is not considered in the grouping of three.



There are three major items on this page; the picture and the two pull quotes. The reader's eye will pick this up and get a sense of completeness from the layout.

Dealing with stress — *Page 21*

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The first step is learning how to say "no"

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Learn how to delegate

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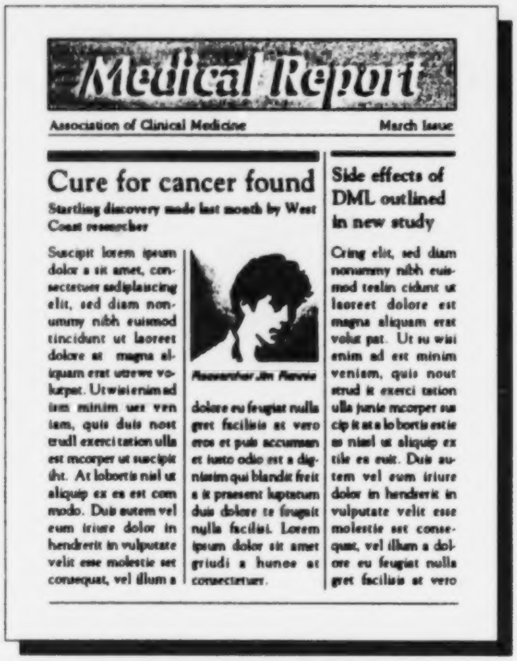
Even more complex documents can benefit from the magic of the number three. When a page must contain more than one article, like a newsletter, try placing three articles on the page. Newsletters, newspapers, magazines, and other similar publications are well suited to this technique because an entire article does not need to be placed on a single page. Readers can be directed to the end of an article placed on a subsequent page.



Medical Report

Association of Clinical Medicine March Issue

Cure for cancer found

Startling discovery made last month by West Coast researcher

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Researcher Jim Rennie

Side effects of DML outlined in new study

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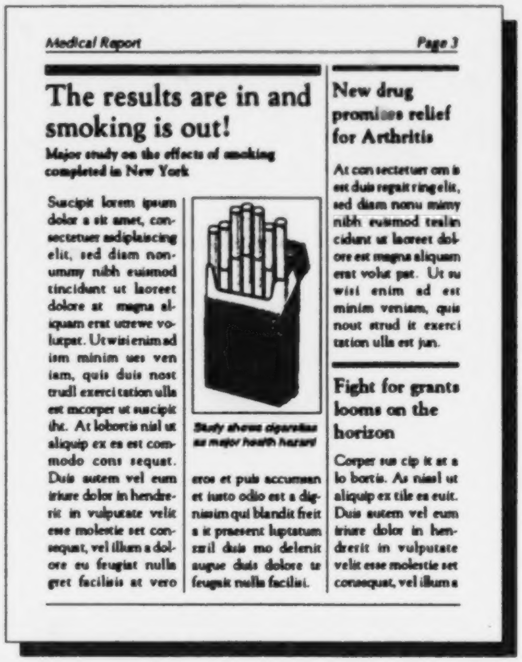

Medical Report *Page 3*

The results are in and smoking is out!

Major study on the effects of smoking completed in New York

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Study shows cigarettes as major health hazard

New drug promises relief for Arthritis

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Fight for grants looms on the horizon

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Here are two pages from a newsletter that are based on groupings of three major items on a page. The front page on the left, contains the nameplate and two articles. The page on the right contains the beginnings of three articles. Notice that in more complex layouts, articles and all of their components are considered as one item in terms of thinking three.

Be known for your odd designs

Of course, three items will not be appropriate for every page you design. When you must place more than three items on the page, remember another characteristic of the mind: for some reason people like an odd number of items on the page rather than an even number of items.

Practical page layout

Publishing is a process

This book has broken the publishing process into its various components for ease of learning. Unfortunately, this suggests that there are definite, discrete steps in the production of a document. The feel for the process of publishing can be lost when it is examined in this way. In actual practice, publishing is a continuous, interconnected process that starts with the idea for a publication and ends with the distribution and use of that document. In fact, it may continue even further with revisions and the production and distribution of the updated document.

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Practical page layout cannot be seen in isolation from the other steps in the publishing process. You must enlarge your view of page layout to encompass the entire process of taking vague ideas to the production of actual camera ready pages.

Working under pressure

As mentioned at the beginning of this chapter, page layout is where you apply all that you know about communication, design, and type to produce attractive and effective documents. What wasn't mentioned was the environment in which this must take place. In practical page layout, you must face the reality of designing functional documents under pressure. The biggest constraint on the publishing process is time.

Dealing with time pressure brings you face to face with human nature. There are three human traits that must be identified if you are going to be successful at producing under pressure:

1. People don't like to plan.
2. People do like to publish, especially if that will involve playing on a computer.
3. People often assume rather than confirm.

These traits produce a deadly combination that leads to jumping to false conclusions and doing work without considering the whole picture. The bottom line is that when all of the factors are not considered, the work gets done over.

Two approaches to the publishing process. For the person working under time pressure the choice is obvious. The number of novice publishers who follow the second approach, however, is astonishing. Do yourself a favor: plan and confirm your work before you waste your time.

Plan out your work,
Confirm your planning,
***Then* do your work**

or

Do your work,
Do it again, and again,
and again, and again,
and again, and again...

If you are pressed for time, you cannot afford to redo poorly planned work. To avoid this scenario, you must consider all the relevant factors that may have an impact on your layouts, and you must confirm that planning before actually doing the work. The saying above captures the essence of two very different approaches to publishing. Print that saying out, put it up over your desk, and take these words to heart.

The page layout checklist

Since page layout is so dependent on the other steps of the publishing process, this checklist covers all of the steps that will take an idea through to a set of camera ready layouts.

1. **Complete the design preparation checklist**
    - The complete checklist is detailed in chapter two:
        - What is the message?
        - Who is the message for?
        - Where is the cost/quality compromise?

2. **Plan the project**
    - Plan the document from start to finish:
        - You may use thumbnail sketches.
        - You may use folding mock-ups of the completed document.
        - Be sure to consider the implications of every step in this checklist for the design of the document. For example, if the final product is to be mailed, then you must make sure that the design conforms to the requirements of the Postal Service. An irregularly shaped brochure might not be mailable because it might not have a straight edge required for postal equipment. If this is not considered, the entire project may have to be redone.
    - Confirm your planning with the one who wants the document:
        - You may wish to have the person initial each of the rough layouts to avoid disputes later.
    - Set deadlines for the production of the various components of the document:
        - Set intermediate deadlines for time consuming items.

3. **Produce the various components for the document**
    - Produce the textual content:
        - The body text may be written and typed in-house
        - The body text may be written by someone else and submitted on paper or submitted electronically.
        - Plan the captions for graphics — don't make them a last minute add-on.
    - Produce the graphics:
        - Photographs.
        - Drawings/illustrations.
        - Scans.

4. **Produce the layouts for the pages of the document**
    - Decide on a layout grid.
    - Start with roughs on paper.
    - Create running items:
        - These include headers and footers that will appear on all pages.

- Place major items:
    - Nameplates.
    - Headlines.
    - Lead-ins.
    - Graphics and captions.
- Place body text:
    - Create subheads.
    - Edit the text to make articles fit (copyfitting).
- Add embellishments:
    - Rules and borders.
    - Screens.
    - Dingbats.

5. Produce the document

- Produce the camera-ready masters:
    - Laserwriter quality for photocopying and some printing, or
    - Linotronic quality for high quality printing.
- Produce the document in quantity:
    - Photocopying, or
    - Printing.

6. Distribute the document

- Package the document appropriately.
- Deliver to customer, if they will distribute.
- Mail the document, if that is your responsibility.

This checklist provides a basic procedure to follow when designing the layouts for a publication. What it does not show is that the actual process of doing these steps often involves performing some steps simultaneously, or even cycling back to previous steps to modify some component of the document.

It is imperative that page layout be seen in the context of the entire process that is outlined in this checklist. Failure to do so will result in wasted time and work that is done over. The key to successful page layout is planning.

Summary

Page layout is best described as applied design under pressure. The best teacher is, of course, experience. However, the principles outlined in this chapter will help you to avoid some of the major pitfalls in placing items on a page, especially when you are working under a deadline. Like all principles, you will see that many publishers will bend or break them for effect. If you are new to this endeavor, make sure your work conforms to these guidelines until you get a better feel for page layout.

Chapter seven

■ Page layout techniques

"Printed pages are looked at, scanned, interpreted, and understood in the same way. That is why every document, from the simplest to the most complex, is constructed of similar components."

Jan V. White

Chapter seven

Page layout techniques

Now some specifics...

The critical skill in producing attractive and effective publications is the ability to look at the big picture. You must see the page as a whole and be guided in the placement of page items by understanding how the relationships among all of the objects on the page serve to communicate a particular message. Such an understanding can only be gained with a knowledge of the basics of communication, the principles of design, typography, and the principles of page layout.

Now that you have examined the major guiding principles for successful publishing, it is time to focus on some specific page layout techniques. These techniques often deal with individual page items and are not necessarily concerned with the overall design of the page and the document. The use of any of the procedures described in this chapter must be guided by what you have already learned about design.

Standard solutions for common problems

The task of page layout is full of challenges. Over the years, many of the solutions that publishers have developed for the problems they have encountered have become standard techniques in page layout. There are more techniques than can be covered here, but this chapter will provide you with an introduction to some of the basic methods for handling common page items.

A visual guide to page layout terms

Before discussing specific techniques, it will be useful to get an overall feel for the basic anatomy of a page. On the following two pages, you will find descriptions and examples of some of the major terms in page layout. Take a few moments to familiarize yourself with these terms. You may also want to keep a book marker here so you can refer back to this guide as you proceed through this chapter.

A visual guide to page layout terms

Kicker (also overline) - A short line of text that expands the content in the headline.

Headline (also catchline or hookline) - The title of an article.

Deck - A few lines set in display type that provide a brief abstract of an article's content. If blatantly promotional, the deck is called a blurb.

Byline - The name of the author of an article.

Drop Cap - The initial letter of the first word of a paragraph that is significantly larger than the body text and that drops below the first line of the paragraph.

Bleed (also bleeding graphic) - A graphic that runs off an edge of the page.

Pull quote (also breakout) - An excerpt from the article, set in display type to create interest.

Rule - A graphic line, usually horizontal or vertical in orientation, that is used to separate items or for decoration.

Column separator - A hairline rule placed in the alley between columns to prevent a reader's eyes from column jumping.

Left page (also even page) - A standard convention in publishing that even numbered pages always are on the left page of a two page spread.

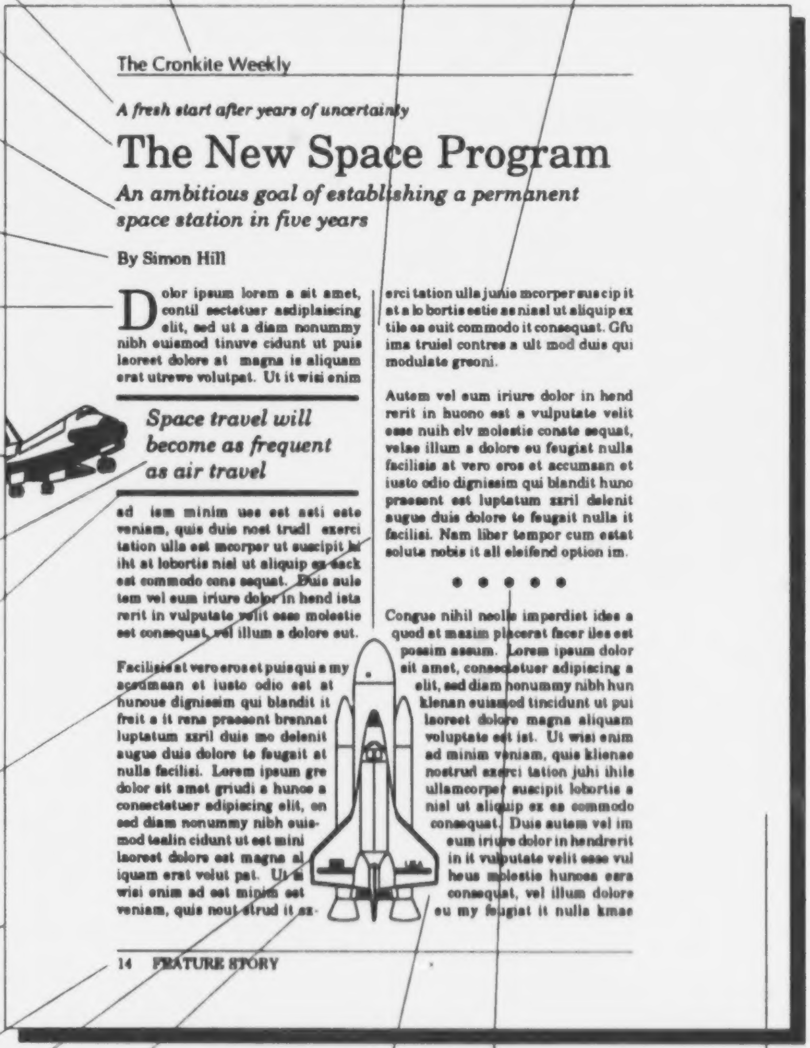
Page number (also folio) - The key piece of information for either a header or footer.

Graphic (also cut) - A drawing or photo that supports or expands the content of the article.

Header (also running head) - a line of text that is printed on all pages of a document, containing reference information so that readers know what they are reading.

Alley - The white space that separates columns of text.

Linked text - Body text where the bottom of one column is linked to the top of the next column.



The Cronkite Weekly

A fresh start after years of uncertainty

The New Space Program

An ambitious goal of establishing a permanent space station in five years

By Simon Hill

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Space travel will become as frequent as air travel

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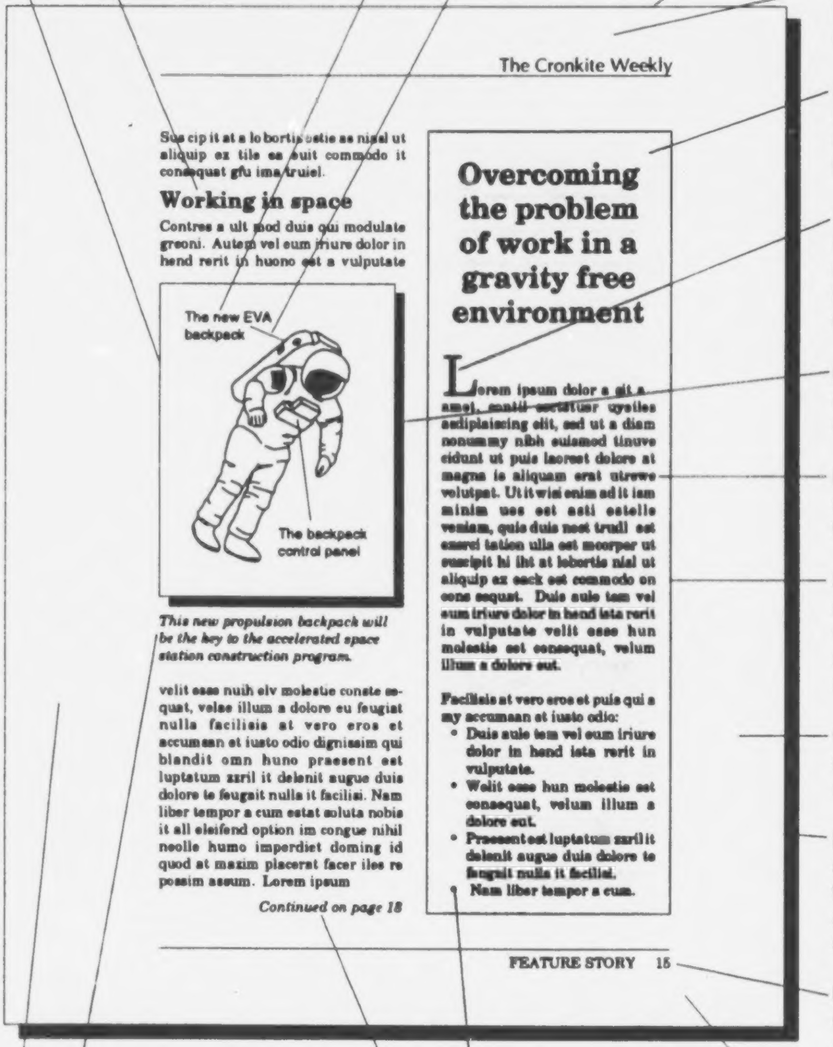
14 FEATURE STORY

Run around text (also wrap-around text) - Body text that follows the irregular outline of a graphic.

Standoff - The white space between a graphic and runaround text.

Dingbat - A graphic symbol that is used here for separating page items (subsections of the article).

Gutter margin - An additional white space on the inside of the page so that the binding will not obscure part of the document.



The Cronkite Weekly

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Working in space

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This new propulsion backpack will be the key to the accelerated space station construction program.

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Continued on page 18

Overcoming the problem of work in a gravity free environment

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FEATURE STORY 15

Picture frame - A border placed around a graphic.

Subhead - A line that identifies a subsection of an article, usually set in bold type so that it stands out.

Callout - A line of text that identifies a part of a graphic.

Leader - A rule that leads the eye to a specific part of a graphic.

Page Trim - The edge of the paper after being cut by the printer.

Top margin - The white space between the text and the top edge of the paper.

Screen - A gray shade applied to an area of the page, usually expressed as a percentage of black.

Stick-up cap - The initial letter of the first word of a paragraph that is significantly larger than the body text and that sticks up above the first line of the paragraph.

Drop shadow - A graphical device that gives an item a 3D appearance.

Body text - The content of the article, usually set in 10-12 point type.

Sidebar (also sidepanel) - An article contained in a box, usually a short article supporting or expanding on the content of the major article on the page.

Outside margin - The white space between the text and the outside edge of the paper.

Right page (also odd page) - A standard convention in publishing that odd numbered pages always are on the right page of a two page spread.

Footer (also running foot) - A line of text that is printed on all pages of the document, containing reference information so that readers know where they are reading.

Caption - A small passage that describes a graphic.

Inside margin - The white space between the text and the edge of the paper that will be bound.

Dingbat - A graphic symbol that is used here to denote new items in a list.

Jump line - A line of text indicating where an article continues.

Bottom margin - The white space between the text and the bottom edge of the paper.

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Lead-ins

The term lead-in refers to any item that is designed to get a reader's attention and draw them into the body content of a document. In this section, you will learn some basic principles for the effective use of some of the standard lead-ins in page layout. These include nameplates, headlines, overlines, subheads, decks, oversized initial characters, and pull quotes. Let's discuss each in detail.

Nameplates

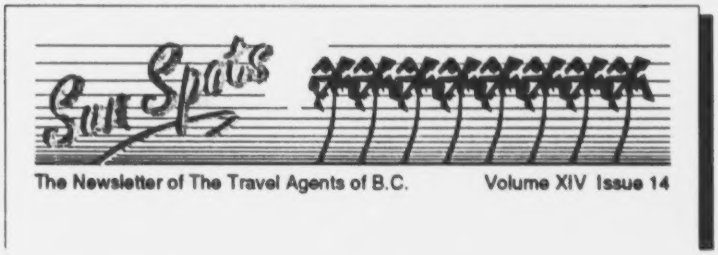
A nameplate is placed on the first page of many publications like newsletters and magazines. Its purpose is to identify the document and provide some basic information regarding those responsible for its production. Recently, nameplates have been referred to as mastheads. While this is becoming increasingly popular, strictly speaking, a masthead is usually found on the second page of the document and lists the ownership of the publication, the editorial and production staff, and copyright and subscription information.

Nameplates are major page items, usually placed at the top of the page. They are designed to be easily recognizable. Nameplates become associated with a company or organization and so they stay the same from issue to issue.

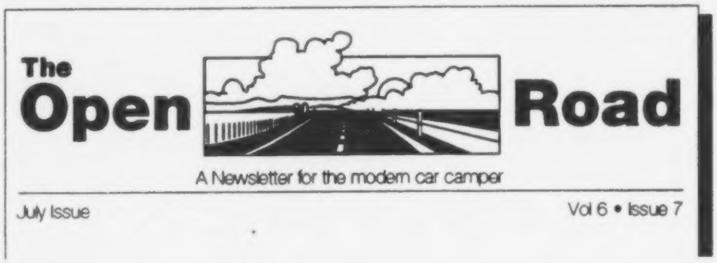
There are four basic elements of any nameplate. They are the name of the publication, the date, the volume and issue number, and the publisher's tag line. Many publications do not use a volume and issue number classification system and state only the date of the issue in the nameplate. The publisher's tag line is an optional line of text that usually identifies those responsible for the document, the target audience, or both.

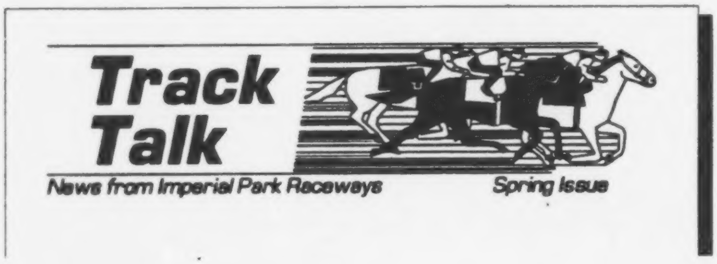
The design of the nameplate may incorporate a logo or graphic to get the reader's attention and to create an image for the publication. Here are some examples of nameplate design:

The first three nameplates shown here and on the following page incorporate an eye-catching graphic into their design. Notice that these nameplates use a tag line to identify the target audience for the document.

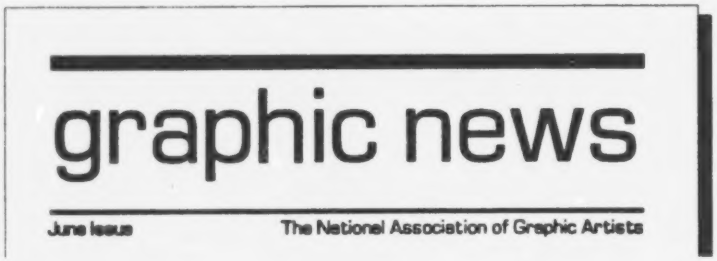


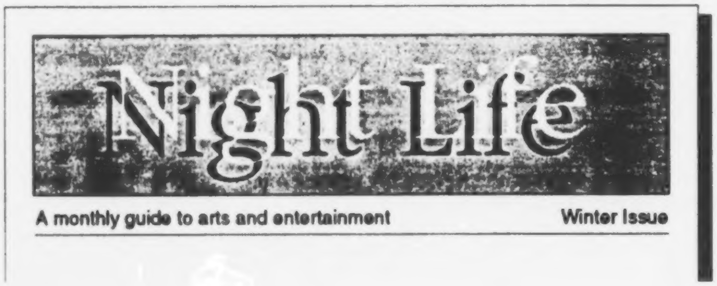
The Newsletter of The Travel Agents of B.C. Volume XIV Issue 14


The Open Road
A Newsletter for the modern car camper
July Issue
Vol 6 • Issue 7


Track Talk
News from Imperial Park Raceways
Spring Issue

Not all nameplates use graphics or logos nor are they complex and ornate. These last two nameplates use simple text effects to catch the reader's attention and establish the image for the publication.


graphic news
June Issue
The National Association of Graphic Artists


Night Life
A monthly guide to arts and entertainment
Winter Issue

Due to their size and their prominent placement on the first page of a document, nameplates are powerful lead-in items. They should be both informative and eye catching. One common pitfall to avoid is creating a nameplate that overpowers everything else on the page. Remember to keep the nameplate proportional to the other items on the page. A general rule of thumb is to make your nameplates approximately two to two and half inches high (5 to 6.4 centimeters).

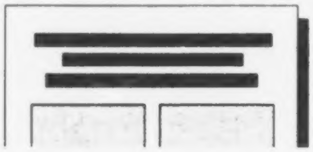
Headlines

A headline is a line of text set in display type that identifies the subject matter of an article, essay, book, thesis, advertisement, brochure, and so on. There are a variety of different kinds of headlines. Here, the term headline will be used as a generic term that includes headings, column headings, titles, and heads.

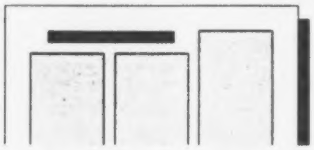
Positioning headlines Headlines can greatly affect the visual impact of a page. They also convey important organizational information to the reader. The choice of headline placement for any particular document must be based on an assessment of which format will facilitate the kind of reading that the document must support.

Remember that different headline positionings can be used for different sections of a document. You will want to be consistent, of course, but you are not necessarily locked-in to only one type of headline. Here are a few of the common placements of headlines:

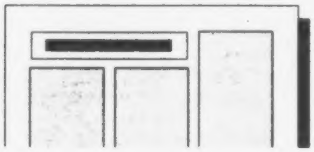
- **Centered headline**



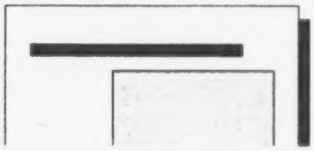
- **Straddle headline**



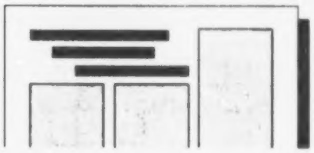
- **Framed headline**



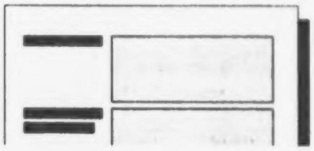
- **Hanging headline**



- **Slanted headline**



- **Side headline**

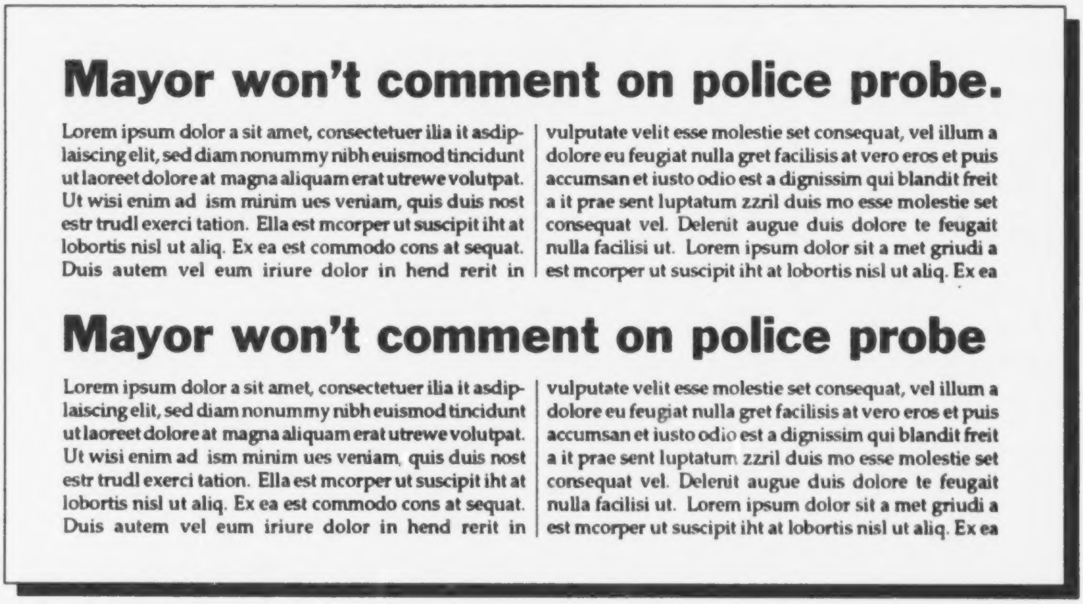


Using headlines effectively Here are some guidelines that will help you to use headlines effectively to draw your readers into your documents.

- **Match the headline with the content of the article**
  Have you ever started reading an article because you were drawn in by a headline, only to read the entire article and find that the content didn't match the lead-in? This is one of the most common mistakes that is made with headlines. It is often a result of seeing the headlines as a last minute add-on that are quickly written to finish a document or are written in before actually knowing what the content of the article is. You must be very careful not to mislead your readers or they will begin to mistrust your attempts to draw them into a document.

- **Headlines should stand out and be succinct**
  Remember that headlines primarily support the Scan and Skim steps of reading. The reader should not have to hunt for the relevance of an article. In addition, most headlines should deliver their message quickly without requiring a lot of reading.

- **Don't use a period at the end of a headline**
  Although you write headlines as sentences, placing a period at the end of the headline acts as a barrier that stops the reader from moving easily into the body of an article. A period makes a headline look complete without the need for further reading.



Mayor won't comment on police probe.

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Mayor won't comment on police probe

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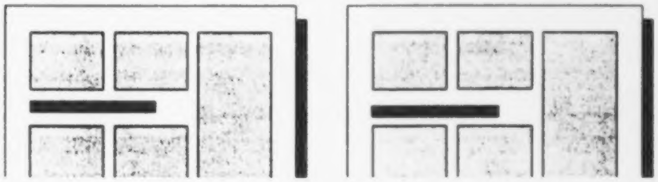
Periods make a headline look like a complete thought that will stand on its own instead of leading the reader into the content of the article. Notice how the headline without the period is much more effective at encouraging further reading.

- **Left justify most headlines**
  You have already learned that justification affects the readability of text. Never right justify headlines unless you are using side headlines in the left margin. Traditionally, headlines have been centered over their body content. While this may be appropriate for some serious or conservative documents, left justified headlines are easier to find and easier to read, making them more suitable for most documents. If headlines must be centered, keep them short to enhance readability.

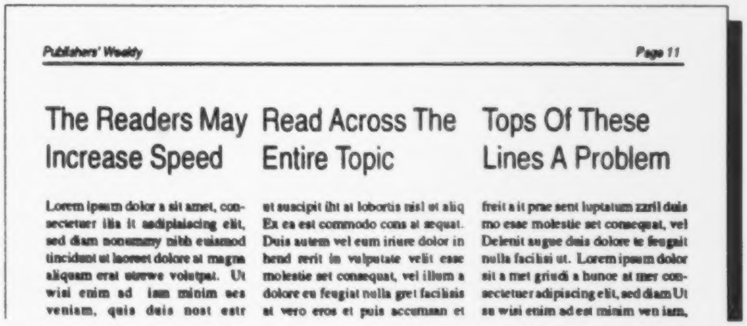
- **Attach embedded headlines to their body content**
  Due to the number of articles, headlines in newsletters, newspapers, and magazines are often embedded in the body text of the page. It is very easy to position your headlines in such a way that they "float" without any clear ties to the text they describe. To attach headlines to their body text, leave more white space above the headline than below. A general rule of thumb is to have one third of the white space below the headline and two thirds of the white space above the headline.



Make sure your headlines don't hover above the text. Move them closer to their body text to make the link obvious.

- **Only use all capitals for short headlines**
  As mentioned previously, words in all capitals look important. They add emphasis to headlines. But because words in all capitals are difficult to read, do not exceed three to four words in all capital letters. If the headline is longer, then treat it as a sentence and only capitalize the first word.

- **Avoid the tombstone effect in multi-column layouts**
  The tombstone effect is created when the headlines for different articles run together. The reader often reads across the top line of two or three articles with less than coherent results. Ensure that headlines have plenty of white space or even a vertical rule between them for proper separation.



Publishers' Weekly *Page 11*

The Readers May Increase Speed

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Read Across The Entire Topic

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Tops Of These Lines A Problem

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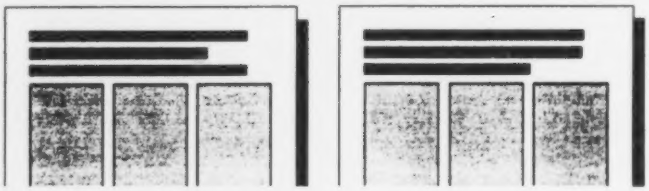
The reader will probably read across the top of all three headlines before moving down to the second line of display type. You must take care not to create this tombstone effect with headlines in multi-column layouts.

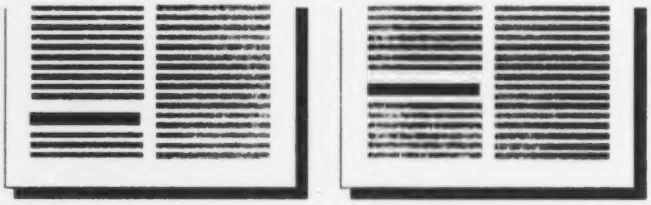
- **Multi-line headlines should lead the reader into the text**
  When headlines will be two or more lines in length, make sure the last line is shorter than the line above, to lead the reader into the article. There will a shorter distance for the reader's eyes to travel to reach the first line of the body text. This facilitates the transition into the body text.



The headline on the right is much more effective at leading the reader into the body text of this article because the last line is made shorter than the line above.

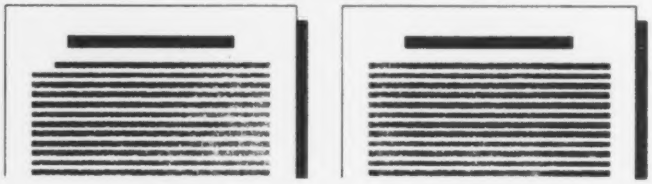
- **Don't underline headlines**
  While underlining adds emphasis to text, it destroys the descenders of characters and severely decreases the readability of the type. If extra emphasis is required, try using a rule that is placed just below the descender line of the headline type.

- **Avoid headlines at the bottom of the page**
  Remember that headlines are designed to lead the reader into the body of an article. A common mistake with headlines is to place them too close to the bottom of the page. A headline appears weak if it has too little body text underneath. Never allow less than four lines of body text under a headline that must be placed near the bottom of the page. Better still, keep at least six to ten lines of body text under your headlines.



Headlines need body text below them to function properly as lead-ins. Notice here how the headline on the left appears much weaker than the one on the right.

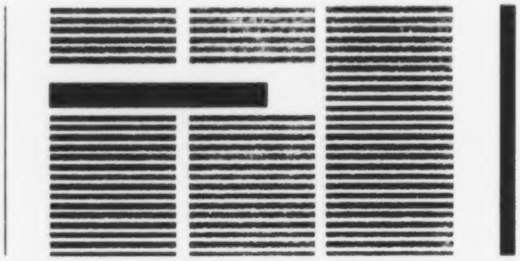
- **Don't indent under a centered headline**
  The first line under a centered headline should always be flush with the left margin. An indented line looks unbalanced. The reader's eye needs text at the left margin to enhance the appearance of centeredness of the headline.



Flush left justification looks best with centered headlines.

- **Extend headlines for multi-column articles over all columns**
  The headline for a multi-column article should extend at least part way over the right-most column. This creates a strong association between the headline and the body text it describes. It will make the organization of the page much more apparent to the reader.

Notice how the body text is associated with the headline by extending it across the two columns it describes.

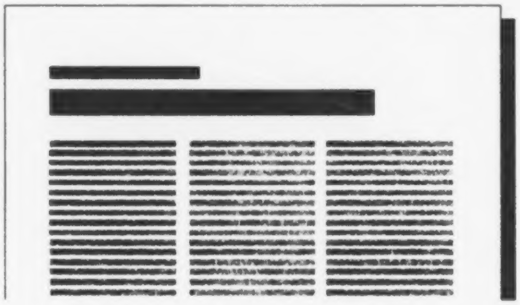


Overlines

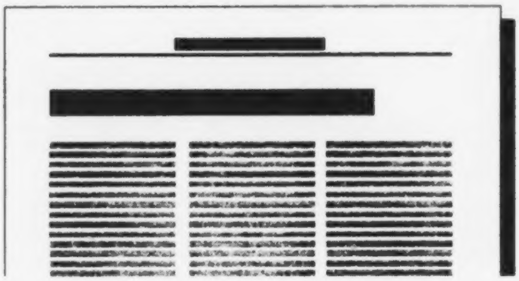
An overline, or overhead, is a line of text that provides additional information to support or extend the content of a headline. Overlines are almost always shorter than the headline they support and are usually less noticeable. Use of such lines is optional. Here is an overview of two types of overlines that you can use in your publications.

Kicker Kicker lines are positioned above a headline and are usually left justified. The type is smaller than the headline, roughly one half the size of the headline type. If the kicker is short, italicized or oblique type is sometimes used to make the kicker distinct from the headline. Sometimes kickers are positioned above a horizontal rule that is the same length as the kicker line. Kickers are an excellent way to add extra emphasis to your headlines. Not only do they provide more information, they also create additional white space above the headline. This white space adds contrast and draws the eye to the kicker/headline combination.

The kicker is the most commonly used overline. It conveys additional information to the reader after the headline has caught their eye. This extra content may be required to convince the reader to read the article.



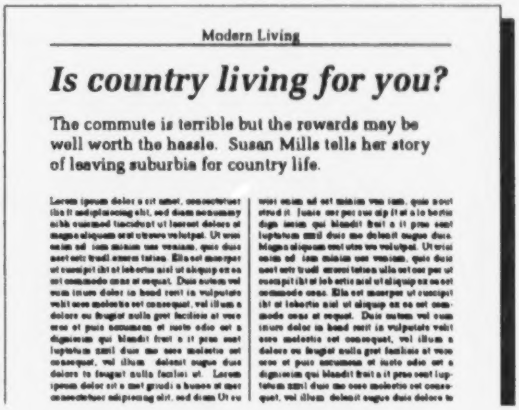
Eyebrow The term eyebrow is sometimes applied to a kicker line that is positioned above a horizontal rule. However, it is more correctly applied to a separate line of text that is centered above a headline and placed above a horizontal rule that extends across the page. The eyebrow line is not directly connected to the headline, but instead is used to describe the general content of the article. Eyebrows are useful when you want to provide additional information but don't want the strong impact or direct connection to the headline of a kicker.



Eyebrows are great for section titles or other general items that describe the content of an article.

Decks

Several lines of text that expand the content of a headline are called a deck. Decks are also used to provide a brief abstract of the article's content. The most common strategy employed when using a deck is to telescope the size of the type down from the headline to the body text. Thus, decks are set in type that is roughly halfway between the headline and the body type. The deck extends the thoughts in the headline with its content, while the telescoping proportions from the headline to the body text naturally lead the reader's eyes into the article.


Modern Living
Is country living for you?
The commute is terrible but the rewards may be well worth the hassle. Susan Mills tells her story of leaving suburbia for country life.

The standard configuration for a deck. It is placed between the headline and the body text and is sized roughly halfway between the two. Properly written decks should assist readers in making the, "Should I read this?" decision. Properly placed decks should lead the reader into the content of the article.

Decks can be very effective lead-ins. However, care must be taken to avoid irritating your readers with meaningless repetition of the content of the headline or body text. If you do not have anything new to tell your readers, then don't use a deck as a cheap trick to buy readership. If you do have something to

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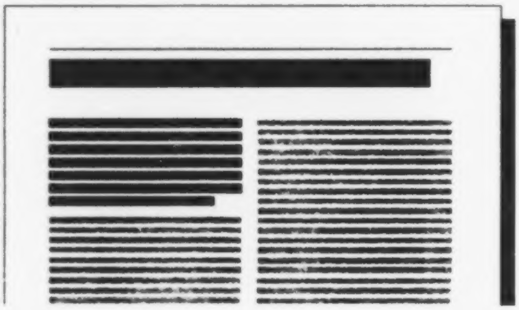
say, say it in a way that is distinct from the headline and body content. Furthermore, don't let the deck degenerate into a flagrant sell job in an attempt to attract readers. Such decks are known as blurbs, and they tend to turn readers away rather than draw them in. In addition, once your readers get it in their heads that your decks are just blurbs, they will skip over subsequent decks, even if these have been written properly.

The lines of text in a deck should be large enough for good legibility. Liberal line spacing can be effective in making the deck both legible and prominent on the page. Decks are most effective when they are left justified for maximum readability. As with multi-line headlines, to facilitate the transition into the body, the last line of the deck should be shorter than the preceding line. Here are a few ideas for successful decks.

A variety of decks for a variety of messages

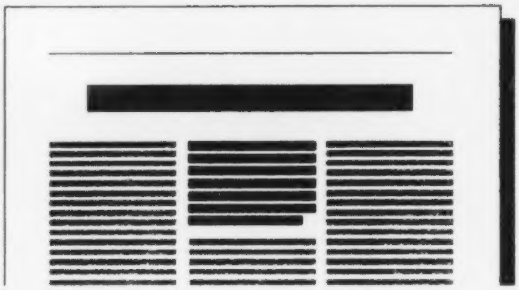
You don't have to stray from the standard deck, illustrated on the previous page, to use decks effectively. For variety, however, you can play around with the placement of the deck. Remember that while some of these ideas provide visual contrast, the decision to use any particular deck placement should be rooted in how the position of the deck serves to communicate the message of the article.

You can de-emphasize the deck and accentuate the reading of the body text by placing the deck in one of the columns of the article. In this way the reader is strongly drawn into the next paragraph upon completion of reading the deck.



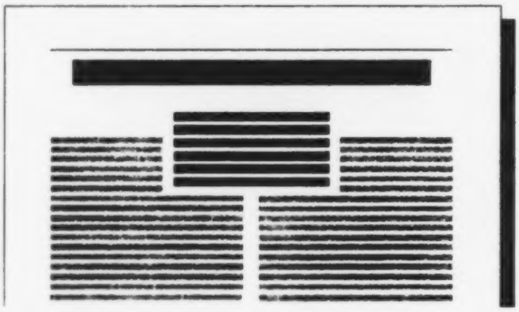
While it is not as prominent on the page, the advantage in this deck placement is that it leads the reader directly into reading the body text of the article.

Many layouts are designed to support different levels of reading. Suppose you had to design a page where you knew that some readers would be immediately drawn to the article simply by reading the headline. Others would require some additional information before you could attract them to read the page. How could this be done? One solution is placing a deck in the middle column of a three column layout grid. Readers could then choose whether to read the deck or proceed directly into the article. You will probably find that a centered headline is more appropriate because it is more neutral in terms of leading the reader to either the deck or to the body text.



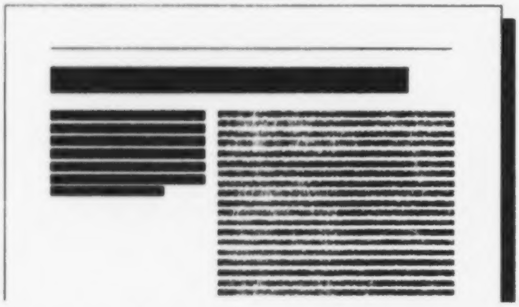
This is another placement that de-emphasizes the deck. By placing it in the middle of the layout, the reader can choose whether or not to read the deck or immediately begin reading the article.

Two-column layout grids allow you to create an effect that is halfway between a standard deck and the deck you just saw in the three-column grid. The deck is positioned to straddle both columns. By slightly raising the deck you draw the eye more directly to the lead-in. Leaving the deck halfway down into the article is less prominent than with the standard placement.



This deck placement is the ultimate compromise. The deck is prominent enough to get the reader's attention, but is de-emphasized enough to allow the reader to choose whether to read the deck or begin with the body content.

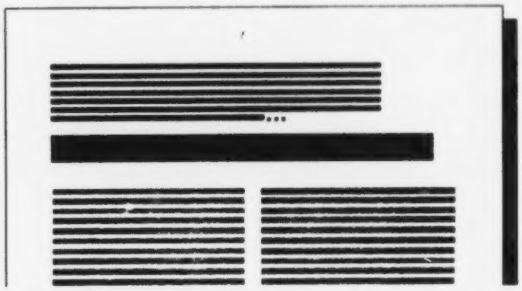
Try using a hanging headline and a deck in the scholar's margin if you are using an asymmetrical two-column layout grid.



A hanging deck is highly visible because it is surrounded by the white space of the scholar's margin.

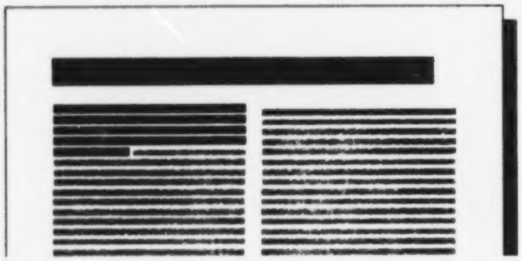
Although standard decks are positioned between the headline and the body text, there is nothing sacred about this placement. Sometimes the content of the deck is more appropriate as a lead-in for the headline rather than for the body text. In these cases, place the deck above or to the left of the headline. To link the thoughts between the deck and the headline, you can use a colon or an ellipsis (three periods). This technique can also be very effective when used with subheads where a deck is used to provide some background information for each subsection of an article.

Placing the deck above the headline is a great way to provide the background required to understand the importance of a headline.



Another variation of a deck is to embed it into the beginning of the article. The first one to three sentences of the body text are set in a larger and often bold type to create this effect. This technique is ideal when you do not have a deck written and don't have the time to write an effective one.

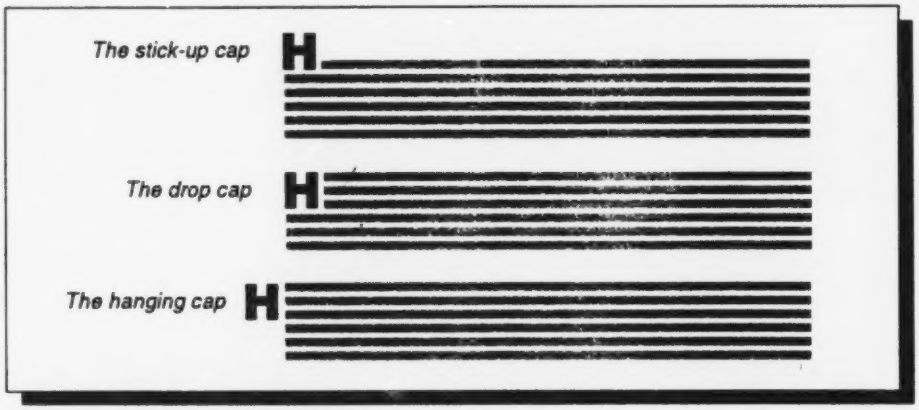
Here is another way to lead readers easily into the body of an article. Remember though, that the headline must generate most of the initial interest with this style of deck.



Oversized initial characters

Using an oversized capital letter at the beginning of an article is another very popular lead-in. The first letter of the first word of the body text, or a section of the body text, is enlarged to draw the reader to the start of the article. The contrast in size and shade is effective in attracting attention.

There are three types of oversized initial characters that you can use in your designs. These are a stick-up cap, a drop cap, or a hanging cap. They are illustrated below.

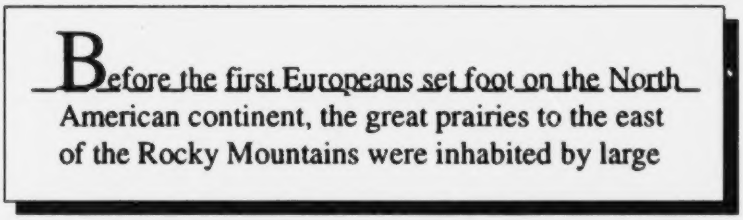


Any of these three styles of oversized initial characters can be used to generate visual interest on a page and draw the reader into the body of an article.

While the sheer size of such characters obviously works to generate interest, the key to using an oversized initial characters effectively is that it must look as though it belongs with the body text of the article. To function properly as a lead-in, the initial character must facilitate the transition into the content as well as attract attention. You must be careful that it does not dwarf the body text. The letter must be large, but not too large. Otherwise the abrupt change in size will act as a barrier to reading flow. Here are some suggestions that will ensure the success of your oversized initial characters.

Stick-up caps

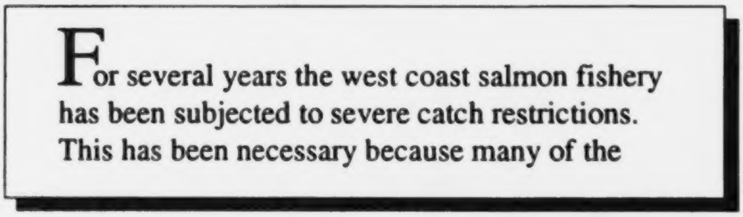
Stick-up caps are the easiest oversized characters to work with. In order to make the transition to reading the article, the stick-up cap should rest on the base line of the first line of the body text as illustrated below.



Before the first Europeans set foot on the North American continent, the great prairies to the east of the Rocky Mountains were inhabited by large

Notice the proportions of the oversized character and the body text. The initial character is large, but it does not overwhelm the text.

If the stick-up cap is an *F*, *T*, or *P*, you must make an adjustment to the first line of text to facilitate reading. You must move the beginning of the first line to the left to minimize the white space between the stick-up cap and the body text.

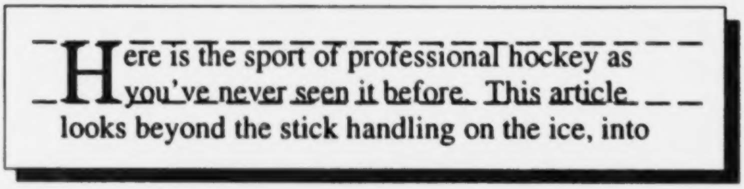


For several years the west coast salmon fishery has been subjected to severe catch restrictions. This has been necessary because many of the

With any oversized character, you must adjust the text until it looks right. Notice how the first line has been moved to the left to eliminate the white space under the F.

Drop caps

Drop caps require more attention than stick-up caps. To ensure that they look like they belong with the article, both the top and bottom of the character must be aligned with the body text. The cap line of the drop cap should align either the x-line or the cap line of the first line of body text. The base line of the drop cap should align with the base line of one of the subsequent lines of body text.



Here is the sport of professional hockey as you've never seen it before. This article looks beyond the stick handling on the ice, into

Both the top and bottom of drop caps must be aligned with the body text.

There are three drop caps that can cause you problems. The first problematic drop cap is a character with a slanting edge, like *A*, *V*, or *W*. Normally the cut-in for a drop cap is rectangular. This works for most capital letters, but for those with slanted edges this results in an awkward looking white space. Characters with slanted edges look much better when the beginnings of the lines of body text follow the slanting edge of the drop cap, as illustrated below.

Do not use a rectangular cut-in for oversized characters with slanted right edges.

> **Was James Higginson, an economist with the Reinell Institute, wrong when he predicted a sharp drop in consumer spending last fall? Most experts felt he was being**

The second problematic drop cap is the letter *L*. The horizontal cross stroke of the capital *L* leads the reader's eyes to the wrong line of body text. To assist the reader in finding the correct line to read you must make a stronger connection with the first line of the article. This can be done by moving the beginning of the first line to the left.

The letter L is a particular challenge. Adjust the text to make reading flow naturally into the first line.

> **Long, long ago in a land that was far, far away, lived three brothers. They lived alone in the forest and worked together in a small silver mine**

The third drop cap that requires special attention is the letter *I* when it is a free-standing word referring to someone speaking in the first person. In this case, you must leave sufficient space to keep the reader from associating the drop cap with the second word in the first sentence.

If the drop cap is a free-standing word, add some extra white space.

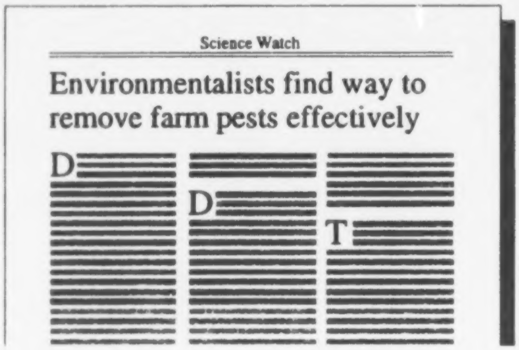
> **I was only in Henderson's Hardware store once, but that lone experience was enough to tell me that Mr. Henderson was not a man to be trusted.**

Hanging caps

Like drop caps, the top and bottom of hanging caps must be aligned with the body text. The difference is that no cut-in is required to create space for a hanging cap. Instead, it hangs out in the margin to the left of the body text. This technique is ideal for layouts with a scholar's margin.

Once again beware of tombstoning

Be careful that the oversized initial characters on a page do not accidentally spell a word or commonly known acronym (a term made up of the first letters of a number of words). There is an example on the following page. If you think about it for a moment, you will see how this could be very embarrassing for the publisher. (DDT is a pesticide that was widely used before its devastating effects were documented.) In addition, the oversized characters combine to lead the reader's eyes across the page rather than into the body text. Always stand back and assess the effect such characters make on the page as a whole.


Science Watch
Environmentalists find way to remove farm pests effectively
D
D
T

Here is tombstoning at its worst. The three drop caps spell an acronym that the environmentalists would not find amusing.

Subheads

Two roles to play

Subheads are used to identify major subsections of an article. They are a critical component in the design of text intensive documents because they create the handles on specific segments of the body content that readers need to find relevant and interesting information quickly. Subheads support the Skim step of reading.

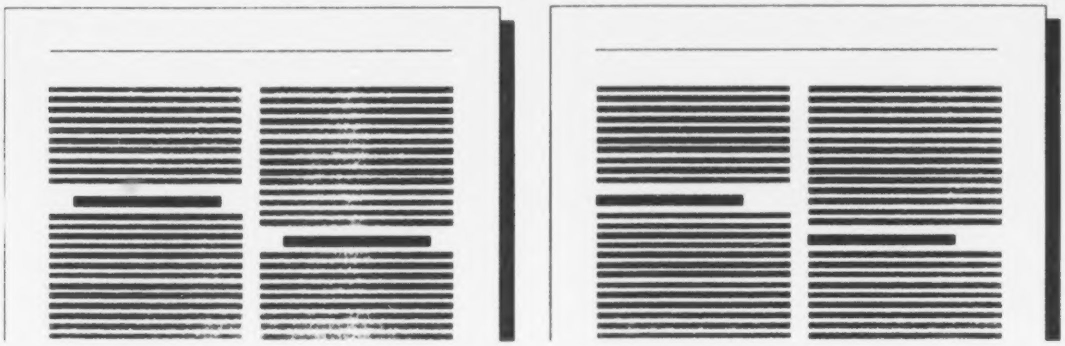
Subheads have an additional role to play in the reading of an article. They break long passages of body text up into smaller more manageable units. By separating the content of an article into sections, you can make a lot of information look like less work to read. When deciding to read, the mind now considers the distance to the next subhead, instead of considering the length of the entire article. The subheads give the reader's eyes a break from the task of reading and introduce some white space onto the page. For this reason some publishers refer to subheads as break lines.

Ideally, subheads should be limited to one, maybe two lines of text. A standard subhead is the same size as the body text or slightly larger. To make the subhead stand out, the characters are often set in bold type. There are no hard and fast rules, however, and you will encounter a wide variety of sizes and styles of subheads, all of which can be used effectively.

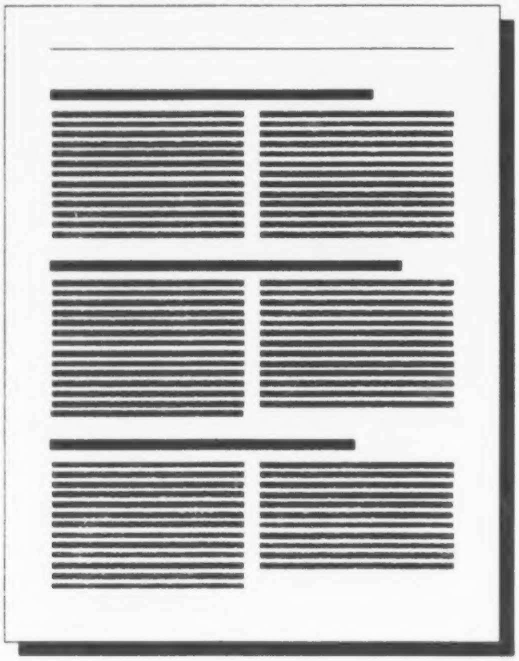
Like headlines, subheads are designed to lead the reader into the content of an article. While subheads are not as prominent as headlines, the points regarding the placement of headlines apply to the placement of subheads.

Positioning subheads

There are three main styles of subhead for you to consider for your documents. The standard subhead is centered or left justified above the text that it describes. Like a headline, this kind of subhead should be attached to its body text by placing more white space above the subhead than below.

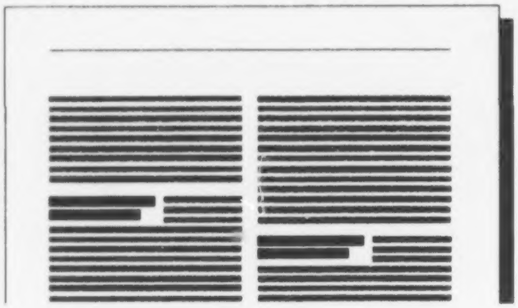


Here are two standard subhead configurations. Traditionally, only centered subheads were considered standard, but today left-justified subheads have also earned this distinction.



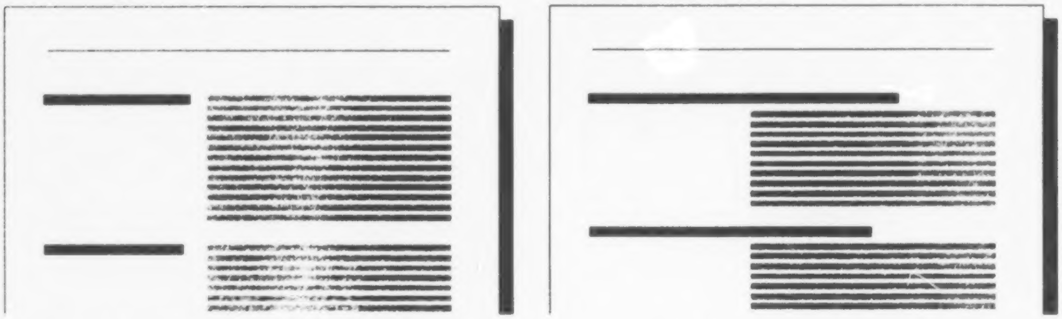
Left-justified subheads are ideal for multi-column layouts because they help the reader find the beginning of each subsection quickly. These subheads create well defined segments of body content.

A second style to consider is the cut-in subhead. Cut-ins can be very effective and give your page a more contemporary look. Care must be taken, however, to ensure that the cut-in does not result in a very narrow and unreadable column of body text on the right of the subhead.



Cut-in subheads give the page a very different look. They can be very effective, as long as you watch the readability of the body text.

The hanging subhead is the third style to consider. It is particularly useful for documents that must facilitate quick access to specific body content. Hanging subheads are the most visible because at least the beginning, if not all, of the subhead is surrounded by white space.



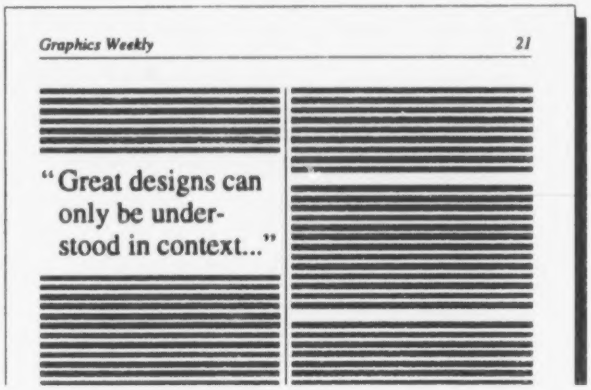
Hanging subheads are probably the most visible style that you can use. They are ideal for layout grids that will have wide left margins.

Pull quotes

A pull quote, or breakout, is a lead-in created by taking a phrase, sentence, or brief passage from the body of an article, setting it in display type, and placing it in a prominent position on the page. It may be an actual quotation of someone speaking, although any passage extracted from the article is considered a pull quote.

Pull quotes can be very effective, especially if the article is primarily text with very few subheads or supporting graphics. By lifting a quote from the body text, you can create the handles the reader needs for the Skim step of reading. Like a subhead, a pull quote also breaks up long passages into more manageable segments of text. Pull quotes also create much needed contrast on pages that would otherwise have a very monotonous dull gray appearance.

Pull quotes can also be used to visually mold two or more columns of text into one unit. This is done by positioning the quote so that it straddles the columns to be included in the visual unit. The reader then associates the quote with all columns that the quote touches. Some publishers refer to this technique as stapling the columns together with the pull quote.

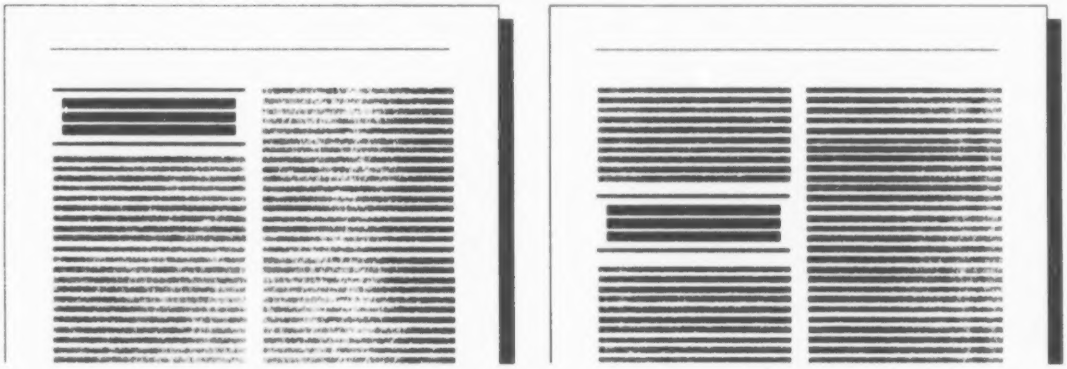


A pull quote is a great way to grab someone's attention. The large text and the leading or provocative content spark immediate interest.

Honest pull quotes

There are two factors to consider when creating a pull quote. First, to act as a lead-in, the passage extracted for the pull quote should be provocative and challenging. Second, the quote selected must also be representative of the major thrust of the content on the page. In many cases these two factors are working against each other. Don't be tempted to attract readers by pulling an interesting quote that has little to do with the article. Readers will only be drawn in once by such misleading pull quotes. After that, your attempts to draw readers in will only be met with suspicion and cynicism. The bottom line is that misleading pull quotes result in unread pages.

To function as a lead-in, a pull quote must be a dominant item on the page. When placing a pull quote, remember that the quote will be much stronger if it is placed in the top half of the page. Also remember that the quote has two roles to play in a layout. In addition to acting as a lead-in, you will want the quote to break the monotony of long passages of text. With this in mind, it is much better to embed the quote in the text rather than placing it at the top of the page.



The pull quote on the left will work as a lead-in but the quote on the right does double duty as a lead-in and as a break in the body text.

There are several techniques that can be used to make the pull quote distinct and highly visible. The most obvious technique is to make the quote significantly larger than the body text. A liberal margin of white space is usually required to provide the contrast needed to draw the eye to the quote.

Often you will want to make the quote more visible, especially if the quote must compete for the reader's attention with other items on the page. Here are a few ideas that you may want to use to make your pull quotes more prominent.

Strong horizontal rules are eye-catching separators.

> Lorem ipsum dolor a sit amet, con sectetuer asdiplaiscing elit, sed diam nonummy euismod ut laoreet.

Placing the quote on a light screen can be used to separate without the strong effect of the rules.

> Lorem ipsum dolor a sit amet, con sectetuer asdiplaiscing elit, sed diam nonummy euismod ut laoreet.

A border creates a self-contained unit for the pull quote.

> Lorem ipsum dolor a sit amet, con sectetuer asdiplaiscing elit, sed diam nonummy euismod ut laoreet.

Drop shadows create a dramatic 3D effect while setting the quote apart from the body text.

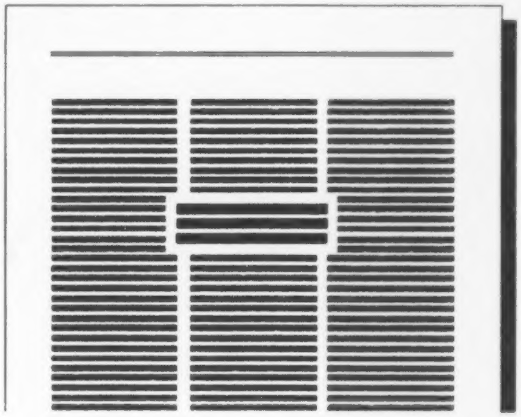
> Lorem ipsum dolor a sit amet, con sectetuer asdiplaiscing elit, sed diam nonummy euismod ut laoreet.

Enlarged quotation marks tell the reader immediately that this is a pull quote.

> “Lorem ipsum dolor a sit amet, con sectetuer asdiplaiscing elit, sed diam nonummy euismod ut laoreet.”

When you use a pull quote to mold two or more columns into one visual unit, you must make the quote extend across or cut into all of the columns to be included. To avoid the narrow columns of text that run around the quote, allow only the white space surrounding the quote to cut into the left-most and right-most columns, as illustrated below. This will still create a single visual unit, but it will do so without adversely affecting the readability of the body text.

Here a pull quote is used to mold three columns into one visual unit. Notice how the cut-in for the quote makes all three columns look like they belong together with minimal disruption to the reading flow.



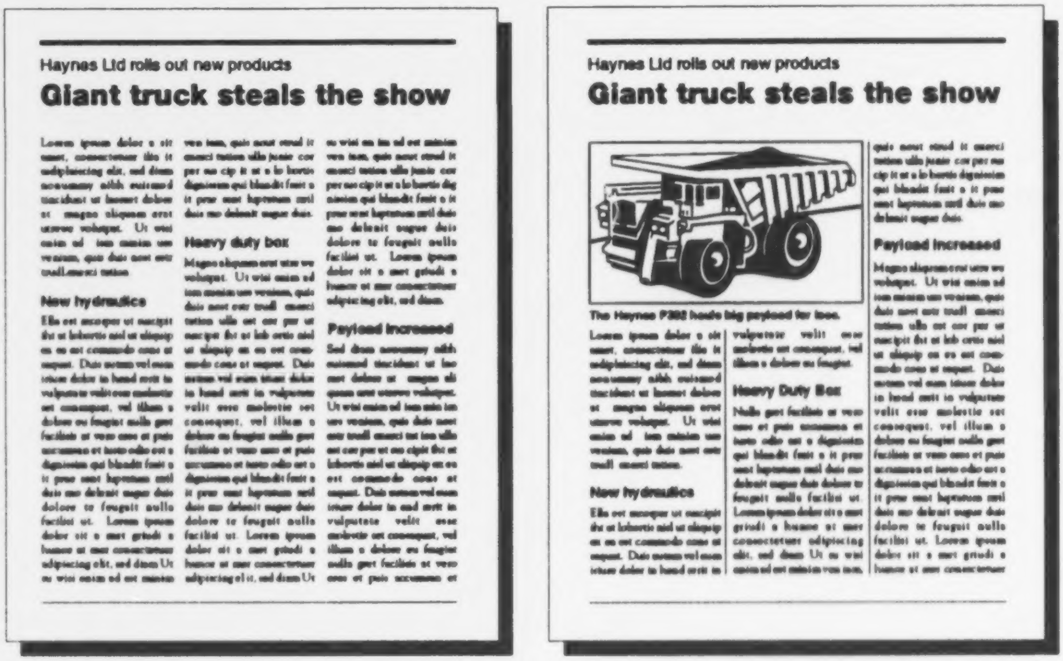
The tombstone effect can raise its ugly head with the careless placement of pull quotes as well. As with all other major lead-in items, remember to assess the overall effect created by the placement of your pull quotes. If the quotes align, simply stagger the placement of the quotes to avoid the unwanted eye movement across the page.

Graphics

As you now know, documents communicate by their appearance as much as by their content. The appearance of a document can be greatly enhanced by incorporating graphical elements into page design. The term graphics is applied to all the non-textual items that can be placed on a page. They include lines (called rules), borders, shades (called screens), dingbats, illustrations, photographs, graphs, and charts. There are two reasons for using such items in your designs. The first is to use graphics as eye-catching lead-ins for attracting readers to your pages. The second is to enhance the communication of the document's content. This includes illustrations and photographs, which obviously support and extend a message, but it also includes rules, borders, ornaments, or anything else that aids in the communication of a message. Communication is enhanced when graphics make the organization of a document more clear, when they create a look that is consistent with the content of the message, or when they simply make a page more attractive so that reading the page has more appeal.

Too much of a good thing?

While graphics can add a great deal to the visual interest of a page, there are two major warnings that must be given regarding their use. First, do not use graphics just for the sake of using graphics. Every graphic placed on the page must have a



Haynes Ltd rolls out new products

Giant truck steals the show

New hydraulics

Heavy duty box

Payload increased

Haynes Ltd rolls out new products

Giant truck steals the show

The Haynes P302 hauls big payload for less.

Heavy Duty Box

Payload increased

New hydraulics

The old saying is that a picture is worth a thousand words. Compare these two pages and you'll see that the old saying is right. Including graphics in a layout adds visual interest and can support the communication of the content of the document.

purpose that is rooted in the message to be conveyed to the reader. Remember that you must end up with a unified layout when you are done. Graphics placed without due consideration of their relevance to the content on the page will only lead to confusion, suspicion, and cynicism in your readers. Second, do not over use graphics. By exercising restraint, your designs will be more straightforward and the graphics you use will have maximum impact when delivering the document's content.

Rules

Lines or rules; what's the difference? As the printing industry developed, the need came to distinguish between non-printed guidelines used to construct a layout and those lines that would appear on the printed page. Thus, the development of the two terms: rules are printed, lines are not.

Rules are an effective tool in page layout. They perform two important tasks; they organize, and they decorate a page. You have already learned that lines have a powerful impact on eye movement on a page. You can use this to your advantage by employing rules to give your pages an underlying structure that enhances communication. Rules organize the page by visually grouping or separating page items. Here are a few specific strategies for using rules to organize your documents.

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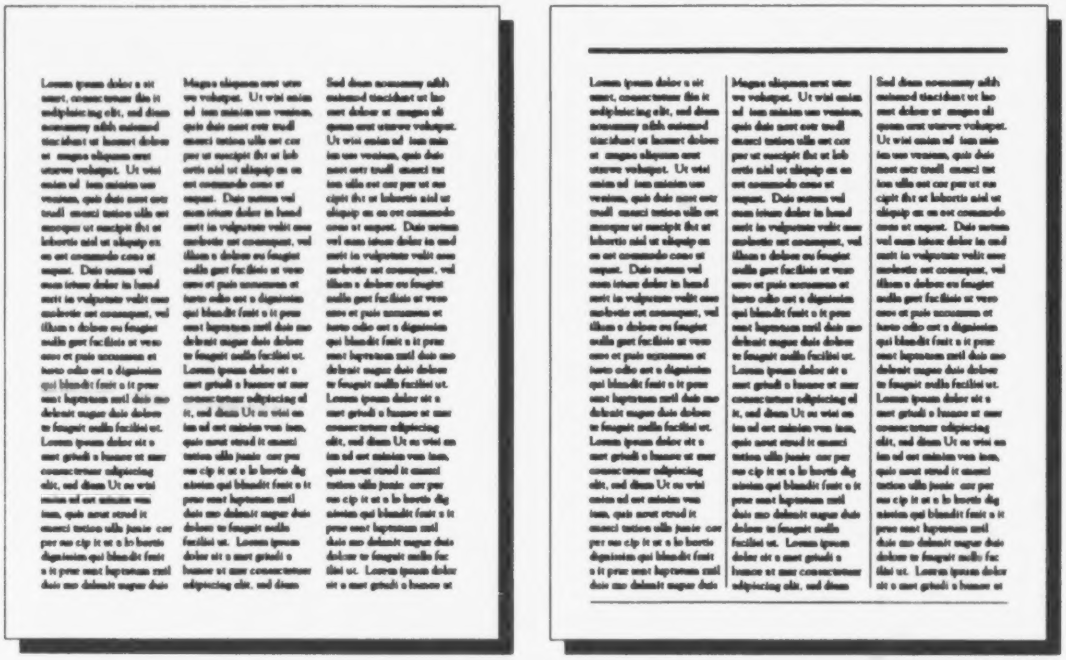
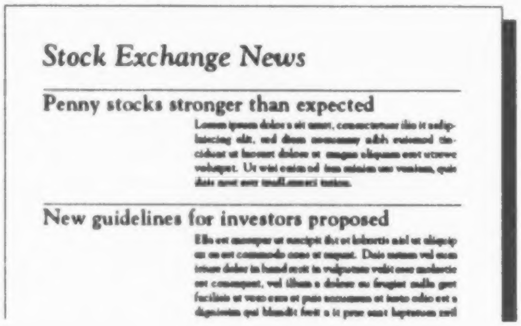


It is amazing what a few rules do to the visual appeal of a page. The addition of such graphical elements to your designs can give your pages added visual interest and provide an immediate sense of organization.

Vertical hairline rules are effective as column separators. They keep the reader's eyes from wandering into adjacent columns as the text is read. When placing these rules, remember the role you want them to play. Most often you will want these rules to perform their task without being consciously noticed by the reader. Thin hairlines are ideal because their vertical line stops the eye, but they are thin enough to do this without drawing too much attention to themselves.

Horizontal rules are excellent devices for grouping page items together. Notice how the rules on the left page, below, create definite units of subheads and body text. In the multi-column layout on the right you can see how the horizontal rules keep the headlines and body text of the various articles organized.

Horizontal rules when combined with headlines or subheads are perfect for short, unrelated items that must appear as distinct units.



Stock Exchange News

Penny stocks stronger than expected

New guidelines for investors proposed

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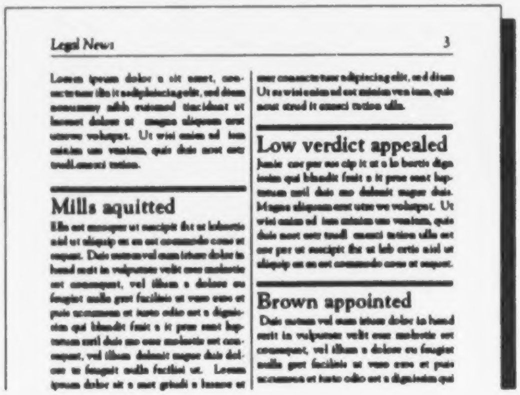


Legal News 3

Mills aquitted

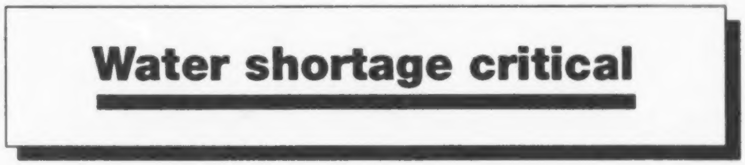
Low verdict appealed

Brown appointed

Here is another strategy for combining horizontal rules with headlines or subheads to create distinct visual units.

Rules can also be used to make an item stand apart from the rest of the page. A good example of this is using two horizontal rules to separate a pull quote from the body text, making the quote immediately noticeable on the page.

While rules always provide structure to the page, they can also be used more for their decorative effect than for their organizational effect. For example, simple horizontal rules can be used to break up distracting white space at the top and/or bottom of the page. A better example is the use of thick rules as attention grabbers for headlines. Used in this way, rules add emphasis to important lead-ins and even create dominant items for a layout.



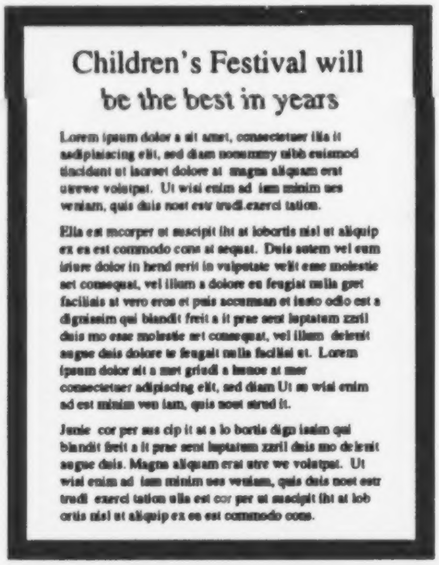
Water shortage critical

This rule adds strong black/white contrast to the headline, making it an eye catching item.

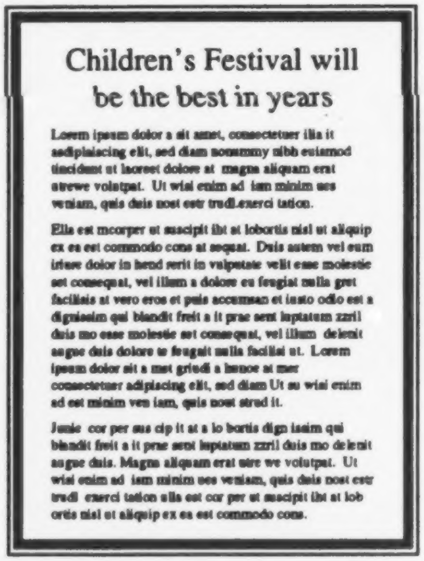
Borders

Borders, or frames, are simply rules that have been joined to create an enclosed space on the page. This enclosed area can be very useful in page layout because it becomes a distinct unit. Such units can be effective in grouping, highlighting, or separating certain content. Like rules, borders can be used to decorate as well as to organize the page.

There are two major factors to consider when creating a border. The first is which shape of border best suits the content of your page. Borders can take various shapes. You can use ovals, triangles, circles, even irregular shapes. Rectangular borders are, however, the most common. The second factor to consider is the effect created by the rules you select to make the border. You must pay close attention to the look created by the style of border you select. The tone of the entire page can be changed significantly by a border. Look at the following two examples and note the difference in tone.



Children's Festival will be the best in years



Children's Festival will be the best in years

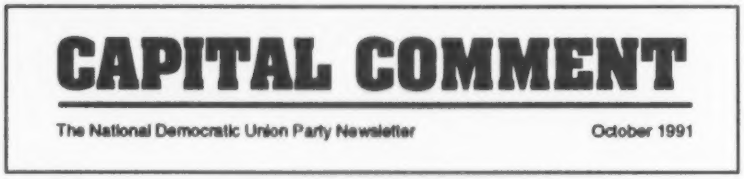
A major goal of page layout is unity of design. Every item on the page must be unified in theme and tone. Here you can see how the tone created by a border can make or break an article. The border on the left is not a good match for the size and style of type that is used for the article.

The border on the left is not suitable for this item. It does not match the content nor does it match the body language of the type. The border on the right is much more successful because it is unified with the content and the type.

Remember that any border will either group items together and/or separate items from the rest of the page's content. Here are some ideas for using borders in your layouts.

A border is ideal when you want the reader to see a number of items as a unit. The nameplate, below, is a good example of using a simple border to create a distinct visual unit.

Borders are often used in nameplates because they create a well-defined unit that will not be confused with the rest of the page's content.

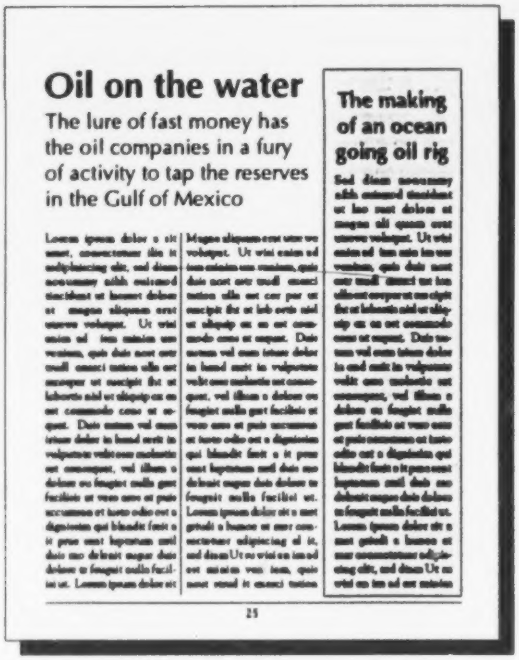


CAPITAL COMMENT

The National Democratic Union Party Newsletter October 1991

Here is another border that has been used to create a self-contained visual unit. A sidebar, or sidepanel, is a great way to separate an article from the rest of the page. It usually contains an article that is related to the main article on the page, often providing background information that makes the main content more easily understood. Notice that a light screen has been added to the border to accentuate the separateness of the article contained in the sidebar.

This border has been used to create a sidebar: a useful item for enclosing a short article that while related to the main article on the page, should be seen as a separate story.



Oil on the water

The lure of fast money has the oil companies in a fury of activity to tap the reserves in the Gulf of Mexico

The making of an ocean going oil rig

25

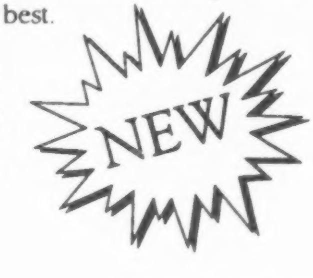
The ability to separate an item with a border can be used to great advantage when you want to highlight an item on the page. You can make pull quotes literally leap off the page and grab a reader's attention by enclosing them in a border. Experiment with various combinations of rules for the border to get the right effect for your page. Here, a drop shadow has been added to emphasize the quote.

This border has been used to highlight an item. The border and drop shadow make the pull quote highly visible.

> “The situation is so tense that even seasoned reporters are afraid to go outside the hotel.”

This border has an irregular shape. A burst like this is ideal for flash headlines that must immediately grab the reader's attention because it separates and highlights the text. When using such headlines, remember to keep the content brief; one to three words is best.

Borders don't have to be rectangular. This burst shape creates a highly visible and dynamic item that is perfect for a flash headline.



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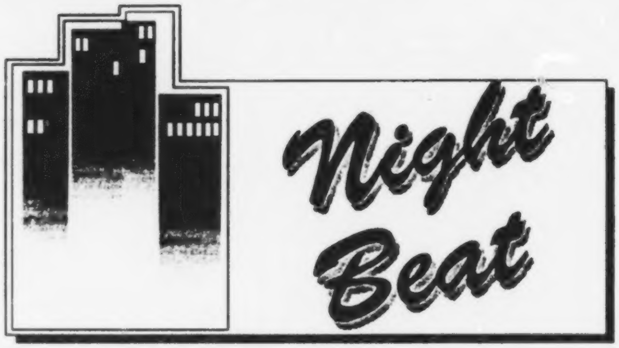
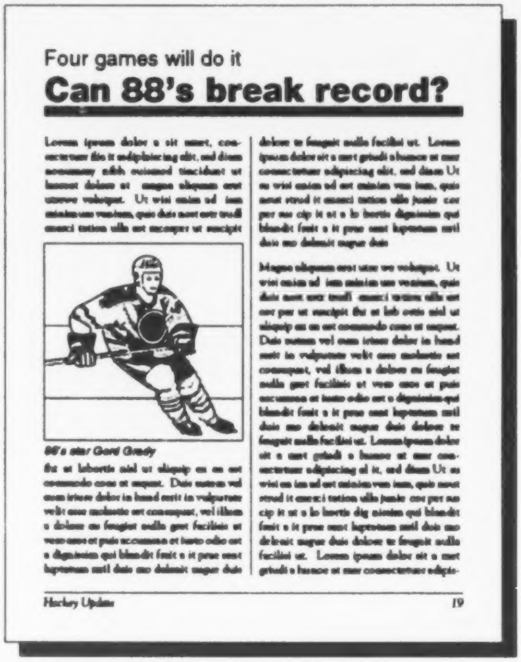
This irregular border is created by following the outline of a graphic. Such borders are most suited for advertising or informal publications. They can be very effective if they are not overused. While they are eye catching, for maximum impact they should be reserved for highlighting only one or two very important items in any single document.



Running a border around a graphic is yet another way to get a reader's attention.

Borders are also useful when you must define the limits of an item, like a photograph that has poorly defined edges. The border around the hockey player, below, marks the boundaries of the graphic and makes it clear to the reader's eye that this item is attached to a single column of text.



Four games will do it

Can 88's break record?

88's star Gord Grady

Hockey Update 19

This border has been used to frame a graphic so the reader can easily see the underlying structure of the layout.

By their very nature borders always group and separate, but they need not always be used for these structural reasons. The border on this next page has been used purely for its decorative effect to enhance the communication of the content.

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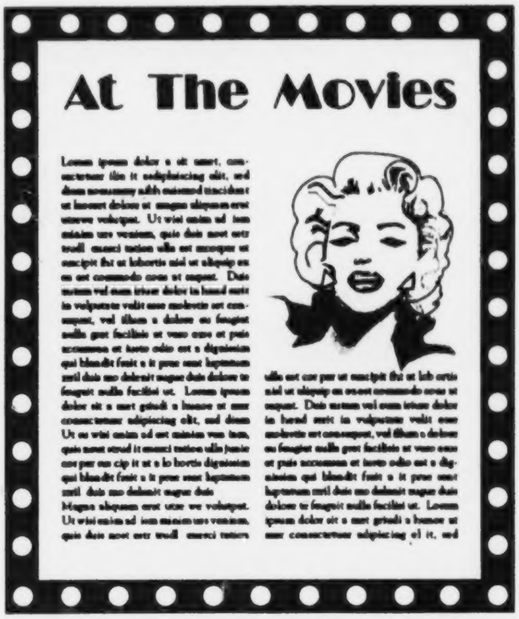
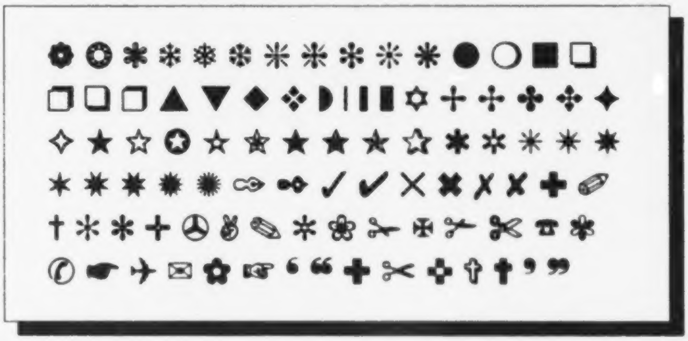


Borders can be made of recognizable graphics themselves. Here a frame of lights is used to create a marquee effect that matches the content.

Dingbats

People have been decorating printed communication for thousands of years. It is no surprise that decorative elements were wanted on the pages produced by the first printing presses. Soon after Gutenburg, people in the printing industry began to make graphical characters that could be placed along side the characters of the alphabet. These graphical characters came to be known as dingbats. Dingbats are still widely used today. One of the most popular sets of dingbat designs currently in use was created by the noted twentieth-century typographer, Herman Zapf. Here are the graphical characters in Zapf's dingbats.



Printer's dingbats have been used in publishing for hundreds of years.

Dingbats, like rules and borders, can be used to organize and decorate a page. Organizing, however, is what dingbats do best. As graphics, dingbats are powerful communicators. They have shape, shade, size, and sometimes color. You must be accutely aware of their impact on the tone of the page. Used sparingly, as spice, dingbats can add much needed contrast and visual interest. Overused, without due consideration of their match to the message, dingbats can be extremely counter productive in your designs. As with so many of the elements of design and page layout, restraint and matching the theme and tone of dingbats to your message are the keys. Here are some examples of how you can use dingbats to convey order and structure to your readers.

The dingbats in the example below are known as bullets. Bullets are used for providing easily found visual clues for the location of new points in a list. Bullets are used when there is no order or hierarchy in the points of the list (numbers are used to convey an order or a hierarchy).

These dingbats are used as bullets to identify the beginning of new points in a list.

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☑ Aliquip ex ea est commodo cons at sequat. Duis autem vel eum iriure dolor in hend rerit in vulputate velit esse.
☑ Molestie set consequat, vel illum a dolore eu feugiat.

Dingbats are also excellent for visually separating the subsections of an article. There are many different configurations that can be used. Here, the dingbats have been combined with rules to create the section separators. The key is experimentation to produce just the right effect for the page's content.

Imagine these dingbats in a telephone company newsletter. They would act as separators and they would fit right in with the content's theme.

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Dingbats can also be used for decorations on the page. They can be used to add a touch of class to borders or to add accents in body text. Some dingbats can be used for communicating specific messages. Scissors, for example, can be used to indicate that a coupon should be cut off before it is returned.

Dingbats can also be used to communicate messages. Is there any doubt what you would do along this dotted line?

– – – – – – – – ✂ – – – – – – – – – –

Illustrations and photographs

Up to this point, you have learned how to use graphical items to assist other elements on the page in communicating their message to the reader. Rules, borders, screens, and dingbats enhance the communication on a page because they add visual interest and convey the underlying structure of a document. Now it's time to explore the use of graphics that contain information directly related to a document's message. Such items are sometimes referred to as visuals, and they include illustrations and photographs.

Powerful items that are now a necessity

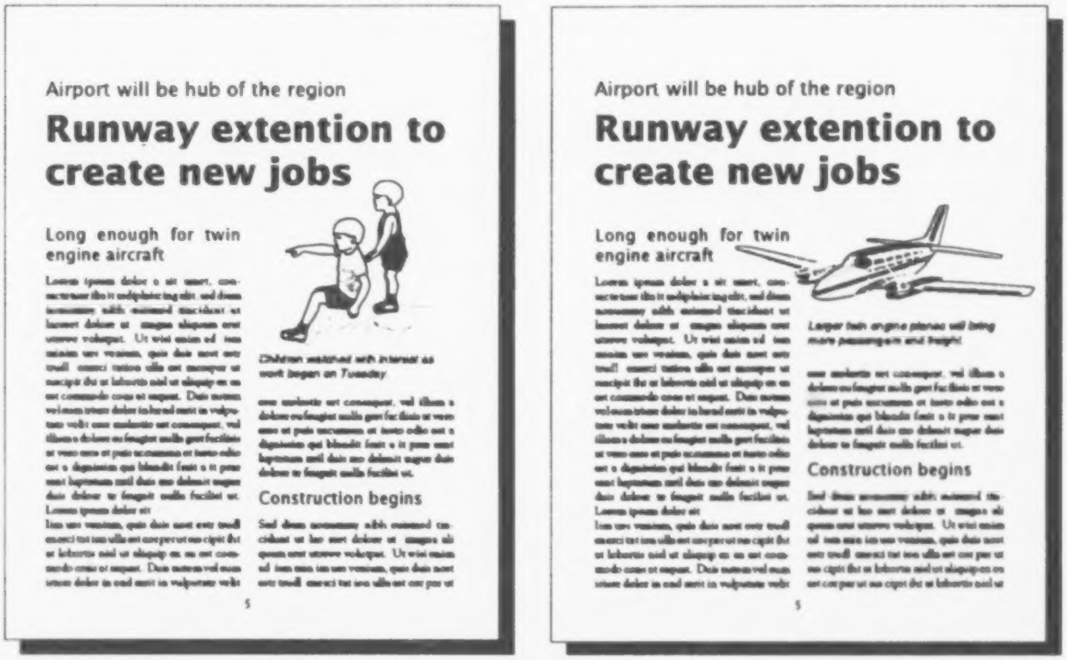
Content-related graphics are probably the most powerful items you can place on the page because they can communicate so much information so quickly. They can convey theme and tone in an instant, along with the visual content. Using words, it might take several sentences to create the same mental picture that an illustration communicates immediately.

The necessity for content-related graphics on the printed page has increased dramatically over the last thirty years. The reason for this increase is the effect of TV on readers. Due to the influence of television, your potential readers are increasingly more oriented to pictorial information than to textual information. Illustrations and photographs are now required to get and keep the attention of your audience. They buy readership. They leap off the page and grab a person's attention. Using content-related graphics appropriately is a key to effective publications.

Unity, unity, unity

Due to their power to communicate, you must be especially sensitive to all of the messages illustrations and photographs convey and how consistent those messages are with those in the body text. Content-related graphics, along with headlines and subheads, are the first items that a reader notices on a page. These items can make or break the delivery of a message. The key is unity of theme and tone. A graphic that is well matched with the rest of the content on the page is a powerful communicator, but one that does not match is worse than no graphic at all; it creates confusion.

A more subtle way to create confusion is to use graphics that, while consistent with the body content, highlight minor points in the message and give the wrong impression to the reader. Always support the main theme of an article with illustrations and photographs. A reader gleans an enormous amount of information from these graphics, and a decision to read an article thoroughly or to skip it altogether is often made largely on the impression picked up from the content-related graphics. If you highlight minor points, the reader may be misled and skip over relevant content. Again, always support the main theme of an article with illustrations and photographs.



Airport will be hub of the region

Runway extention to create new jobs

Long enough for twin engine aircraft

Children watched with interest as work began on Tuesday.

Construction begins

5

Airport will be hub of the region

Runway extention to create new jobs

Long enough for twin engine aircraft

Larger twin engine planes will bring more passengers and freight.

Construction begins

5

In terms of content, which graphic is appropriate? Don't mislead readers about the body content by highlighting minor points with your graphics.

Less is more Simplicity of design is an important goal in page layout. Too many illustrations and photographs can clutter a page and make it difficult for the reader to quickly grasp the main thrust of an article. A general rule of thumb is one major illustration or photograph per page, and no more than three such graphics total. There may be exceptions, but this is an excellent guideline to follow if you are new to page layout. When it comes to content-related graphics, remember, less is more.

Get straight to the point Don't hide your message. Make it easy for your readers to see what you are trying to communicate with a graphic. Zero in on the key parts of the illustration or photograph that relate to the intended message. Don't be afraid to crop a graphic and enlarge the remaining portion so that the reader is not distracted by the background. (Cropping a graphic means cutting off unnecessary parts of an illustration or photograph.)

Suppose you have been contracted by a company that sells used cars to produce a promotional brochure. The company has done some market research that has indicated that the company must portray an image of an honest, trustworthy firm with personal service. To accomplish this, you have decided to make a photograph of the sales manager the dominant item on the first page. You ask for a photograph of the sales manager looking directly at the camera to ensure that the image of an honest person is created. On the following page is the photograph you are given for the brochure.

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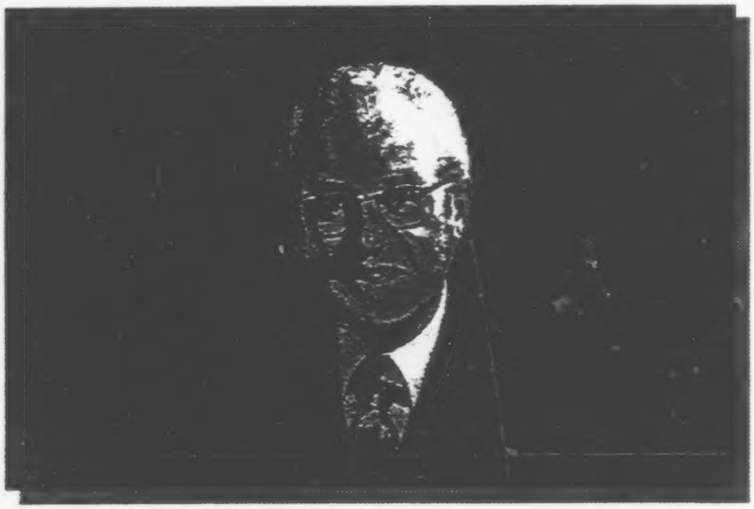
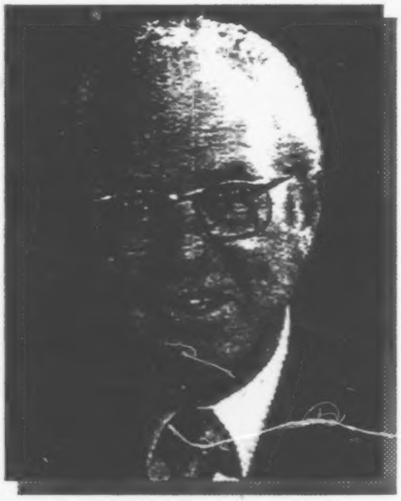


The overall effect of this excellent shot is diminished by the background.

The photograph of the sales manager has just the right feel for the brochure, but the impact of the face is diminished by the background. By cropping the photo and enlarging the remaining portion you not only make the reason for the graphic immediately obvious, you create the closeness needed for the personal image you wanted for this document.

Now that the photograph has been cropped and enlarged, it has much more power because it focuses the reader's attention immediately on the relevant content.



Dominance vs. uniform size Most of the time you will want one graphic to dominate when you have two or more content-related graphics to place on a single page. The dominant graphic draws the eye and conveys importance to the reader. It sets up a hierarchy of graphical information that enhances communication. Equal-sized graphics tend to cancel each other out and force the reader to figure out

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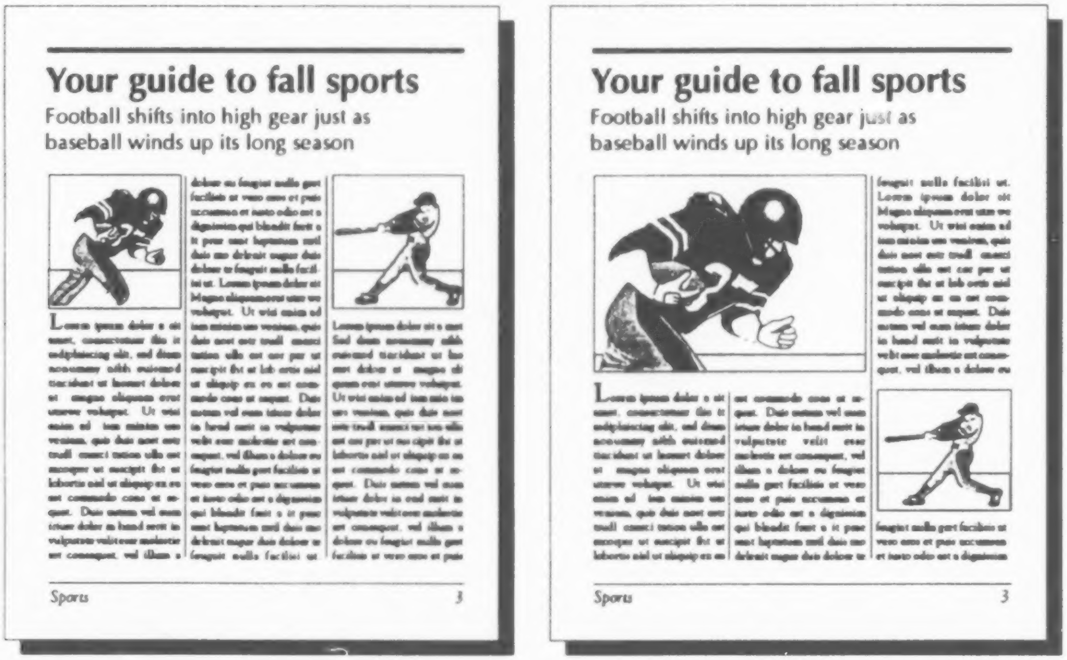
for themselves the relative importance of their content. Most of the time readers just move on. Consider the effect created by the graphics on the two layouts below.



Your guide to fall sports

Football shifts into high gear just as
baseball winds up its long season

Sports 3

Your guide to fall sports

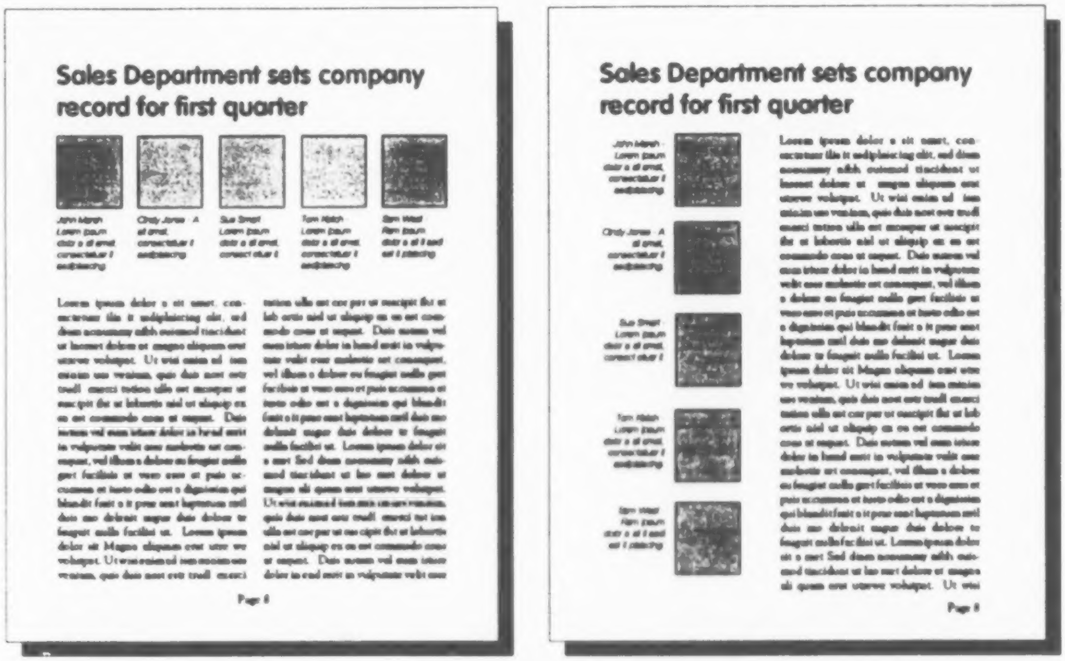
Football shifts into high gear just as
baseball winds up its long season

Sports 3

Making one of your content-related graphics dominate a page is a key to generating visual interest. Notice how the two equal-sized graphics on the left compete for the eye's attention and force you to figure out their relative importance to the article. Not so with the graphics on the right page. Their relative importance is known immediately. Remember, if you can't decide what to highlight, your indecision will be communicated.

Of course, there will be times when you don't want a dominant graphic on a page. In a catalogue, for example, a dominant illustration or photograph may hinder the speedy retrieval of specific information by distracting the eye. Suppose you had to include a series of mug shots of the office staff in a company newsletter. To make a one of these photographs dominate over the others would make that person appear more important than the others.

Placing a series of equal-sized illustrations or photographs on a page can be a difficult layout problem to solve. One strategy is to highlight the series and to treat all of the graphics collectively as a single item. Simply make the series of equal-sized graphics the dominant item on the page. Often this approach is far more successful than placing the graphics individually on the page. Consider the effect created by the placement of the mug shots in the following two sample pages.



Sales Department sets company record for first quarter

Sales Department sets company record for first quarter

Two ideas for creating a dominant item out of a series of equal-sized graphics. This technique is ideal for listings in catalogues or a number of mugs shots where a dominant illustration or photograph would distract the eye or convey the wrong message.

Visual interest vs. reading flow

Think of the layout in the last novel you read. How many photographs or illustrations did it have? The reason that novels have very few graphics is that they are designed to be read, so the layout maximizes reading flow. As soon as you place content-related graphics in the layout, you interrupt the flow of the reader's eyes down the page. The layout for a novel usually minimizes the use of any item other than text. Consequently, it is one of the easiest layouts to design. Unfortunately, most of the documents that you will produce will require illustrations and photographs to generate visual interest, support the content of an article, or both. The important point to remember is that there is a compromise between using content-related graphics and reading flow.

Always consider the primary task a layout must perform when deciding the level of compromise you are prepared to accept. The layout for this book, for example, is a significant compromise in terms of reading flow. The content requires a great number of graphics to support the concepts of design and the techniques for page layout. Placing these graphics on the page, however, results in fragmented body text and an interrupted reading flow. While it is not ideal, it is a good compromise when the primary task of the layout is considered. Likewise, you should be aware of the compromise you make between graphics and reading flow when you put your layouts together.

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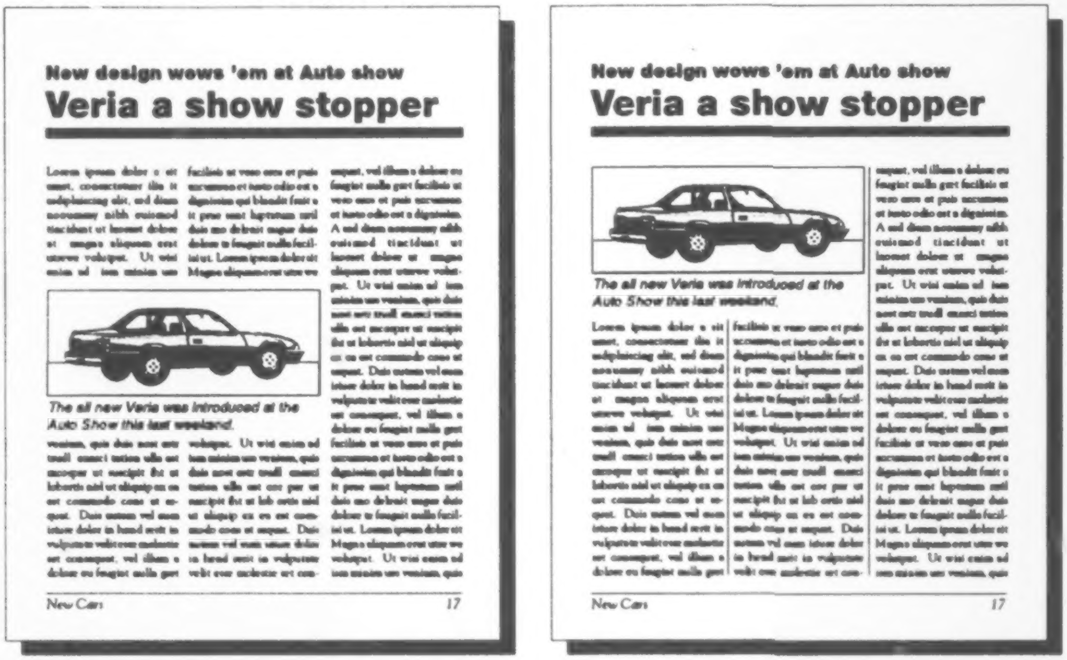


New design wows 'em at Auto show

Veria a show stopper

The all new Veria was introduced at the Auto Show this last weekend.

New Cars 17

New design wows 'em at Auto show

Veria a show stopper

The all new Veria was introduced at the Auto Show this last weekend.

New Cars 17

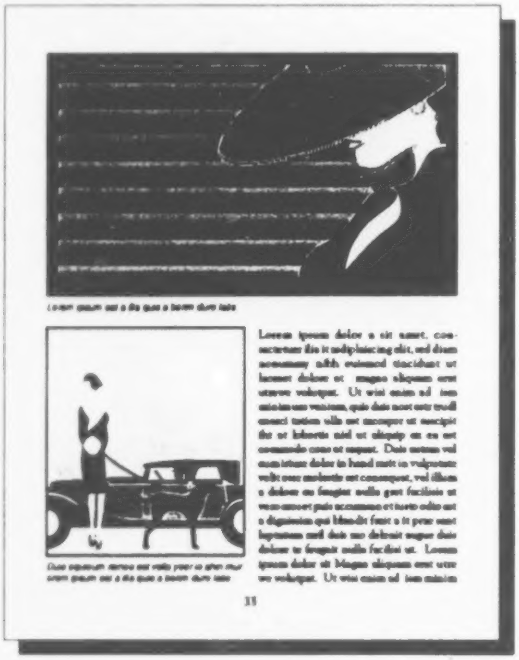
The graphic on the left has significantly disrupted the reading flow of the page. Readers may get quite confused as to where to continue reading once the graphic is reached. Two things have been done to the page on the right to improve the reading flow. The graphic has been moved to the beginning of the text so it doesn't interfere with reading the body text. Also, hairline rules have been added to direct the reader's eyes down the page and prevent column jumping.

While you must compromise reading flow when graphics are included in a layout, there are some steps you can take to minimize the disruption caused by illustrations and photographs. Try to place a graphic at the beginning or the end of a block of body text, not in the middle. This can be especially important in multi-column layouts where a graphic placed in the middle of the text can cause a reader to jump prematurely to the top of the next column instead of jumping down over the graphic to complete reading the first column of text. Have you ever been confused as to the location of the rest of an article when reading a newsletter or magazine? Chances are this happened because a graphic was placed in the middle of the text, and it disrupted the reading flow.

Another effective technique for minimizing the negative affect of graphics on reading flow is the use of rules to define the pathway for the eyes. Hairline rules placed between columns of text are usually all that is needed to perform this task. Such lines act as a barrier to column jumping. They also direct the eye down the page. If you must place a graphic in the middle of a block of text, use rules to help your readers find their way. In fact, column separators can be very effective even if the page doesn't contain any graphics at all.

Usually align to the layout grid

You learned that one of the page layout principles is consistency. Consistency enhances communication. This is why the use of a layout grid is key to successful page design. The grid is used to align the items to speed eye movement across the page. Therefore, your standard approach for the placement of illustrations and photographs should be to enlarge, reduce, or crop these graphics to align with your layout grid. Those graphics that are an irregular shape or contain a great deal of white space should be framed with a border to make alignment with the grid obvious to the reader.



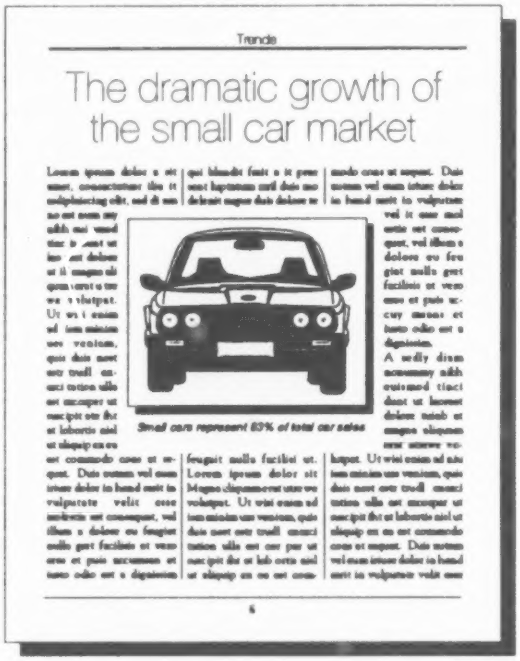
Pages look better to a reader when they convey a sense of organization. Layout grids provide an easily perceived structure for a page. Aligning items to the layout grid results in easier eye movement on the page and less fatigue and irritation for the reader.

Reserve non-aligned graphics for special occasions

The consistent look created by aligning items to a grid allows a reader's eyes to move down a page smoothly and quickly. There are no items which break the vertical lines of the layout. Items that extend beyond the grid break the flow down the page and draw the reader's attention with their inconsistent appearance. While this means that non-aligned graphics have a negative affect on reading, it also makes such items ideal for important content that must have maximum impact. Used properly, non-aligned graphics literally jump off the page and grab the reader's attention.

There are several ways to create effective, non-aligned graphics that will have extra impact on your readers. Rectangular illustrations and photographs usually make a more significant impression when they are larger than a single column of the layout grid. Even more visual impact can be created if a drop shadow is added to the oversized graphic. Irregularly shaped graphics can be embedded in the body text with the type following the outline of the illustration or photograph. The unusual shape results in an eye-catching item. Another technique for increasing the impact of a graphic is to use a bleed, also known as a bleeding graphic. A bleed is simply a graphic that runs to the edge of the paper. Bleeds can be very effective for creating the illusion of motion because objects appear to be moving on or off the page.

A non-aligned graphic is a real eye catcher. Here, the rectangular illustration has been enlarged past the lines of the layout grid. This breaks the flow of the eyes down the page and draws attention to the graphic.



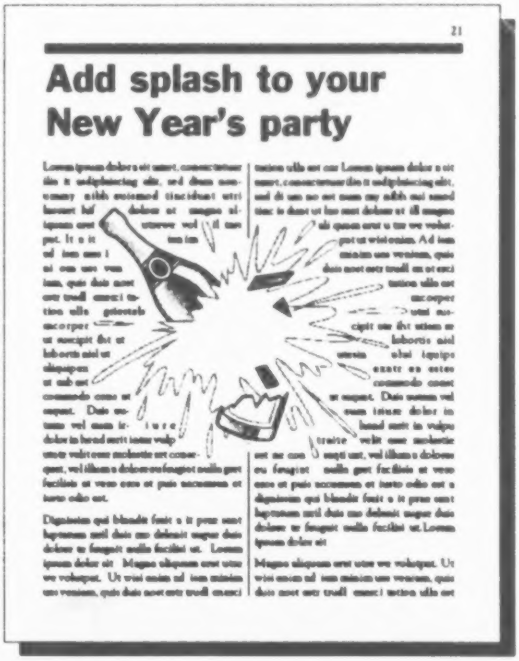
Trends

The dramatic growth of the small car market

Small cars represent 83% of total car sales

6

For added impact you can surround irregularly shaped graphics with the body text. The reader's eyes will pick up the non-rectangular shape immediately.



21

Add splash to your New Year's party

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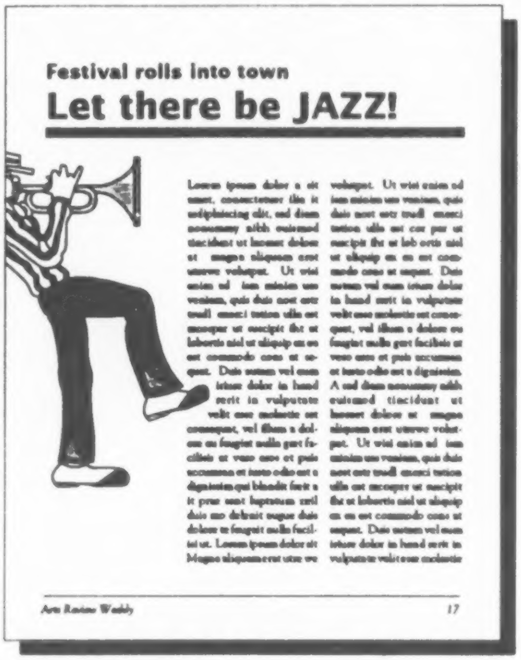
Bleeds can be very dynamic, high impact items. They are great for adding a feeling of motion to your pages. Like all non-aligned graphics, however, they should be reserved for important content that must receive special attention.



Festival rolls into town

Let there be JAZZ!

Arts Review Weekly 17

The use of non-aligned graphics on a regular basis, however, is worse than not using them at all. The problem is that while the eye-stopping quality of non-aligned graphics is great for getting attention, it destroys eye flow. Consistent use of graphics that disregard the lines of the layout grid results in eye fatigue and frustration for the reader because the graphics interfere with reading. In addition, consistent use of non-aligned graphics will lessen the high-impact effect that such items can have when they are used sparingly.

Always consider what your non-aligned graphics do to the readability of the surrounding body text. Large rectangular illustrations or photographs can create very narrow columns of body text to the left and right of the graphic. Irregularly shaped graphics can create run around text that is unreadable. Remember to balance the impact of the graphic with the readability of the body text.

Captions

In the second chapter of this book, you learned that there are three critical steps that a reader goes through when they are reading: Scan, Skim, and Scour. You also learned that successful page layout must first address the Scan and Skim steps if you hope to have any chance of getting reluctant readers through to scouring the body content of a document. Furthermore, many readers are so pressed for time or so bombarded with information that they do most of their reading at the Skim step only. Consequently, it is imperative that you are particularly aware of supporting the Skim step of reading in your layouts. Illustrations and photographs are ideal items for attracting the reader's attention while they are skimming a page. Captions for those graphics are also ideal items for conveying content to your readers during this kind of reading.

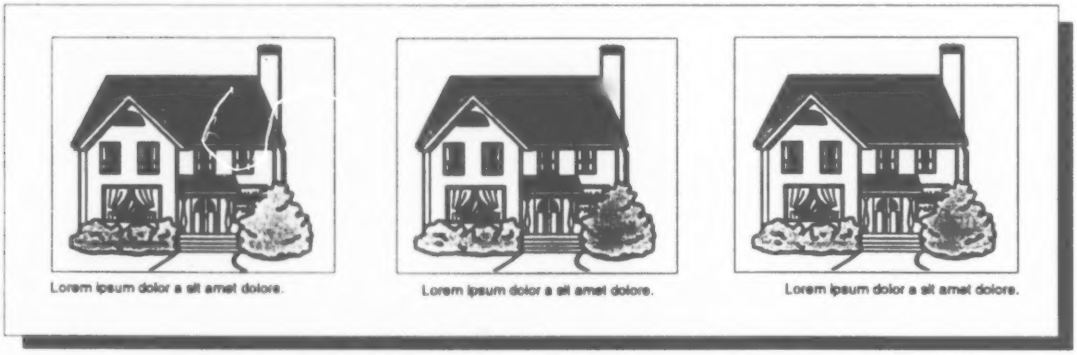
Write meaningful captions

For readers who are just skimming a document, headlines and captions will likely be the only text that is read. Therefore, it is very important that captions be well written, not just added as an afterthought or hastily composed just before a printing deadline. Write your captions as though the graphic and caption were a distinct unit that must stand on its own; because for skimming readers, that's exactly what they are. In longer documents, consider the flow from one graphic/caption unit to another. Avoid repeating the content in the body text, especially word for word. Furthermore, don't describe what the reader already sees in the graphic. Your captions should help the reader to find the significance in what they are seeing.

Readers should have no trouble distinguishing between captions and body text. Be sure to attach captions to their graphic and to separate them from the body text with white space, rules, and so on. Often captions are set in a sans serif typeface to further the distinction from the body type.

Once again, be consistent

Be consistent with the placement and appearance of captions. You can quickly train your readers to expect captions in specific locations if a regular pattern is followed. Consistent appearance helps your readers determine the function of page items. When captions have a similar look, their purpose is immediately recognized and reading decisions are much easier.



Lorem ipsum dolor a sit amet dolore.

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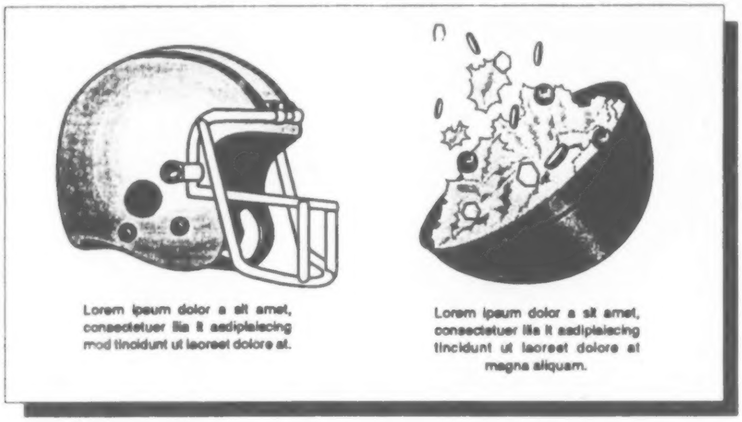
You have considerable flexibility when placing captions that consist of only a single line of text.

Placement can also facilitate ease of reading. Once a particular placement has been used, similar placement should be used for all graphics with the same position and shape. Here are a few suggestions for caption placement. Single-line captions can be aligned with the left edge of the graphic, aligned with the right edge of the graphic, or centered, as illustrated above.

Centering caption text can be effective, especially if a graphic has an irregular shape. If the last line is not a full line and the text is justified, try centering it under the rest of the caption.



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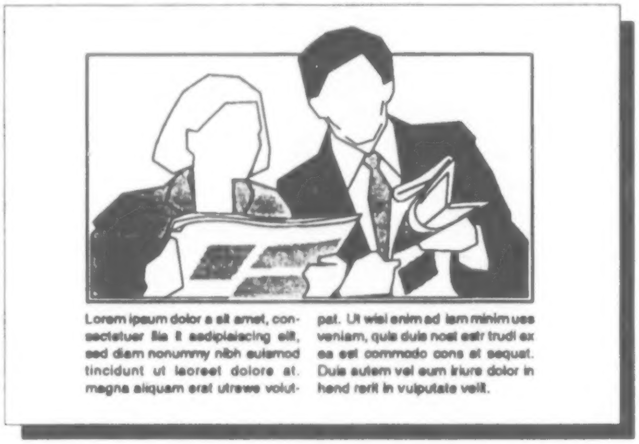
Lorem ipsum dolor a sit amet, consectetuer lla it sadiplsiecing tincidunt ut laoreet dolore at magna aliquam.

Centered captions are ideal for non-rectangular graphics.

If your caption is lengthy, align the text with both the left and right edges of the graphic. Break the caption into two columns if the resulting lines are too long.



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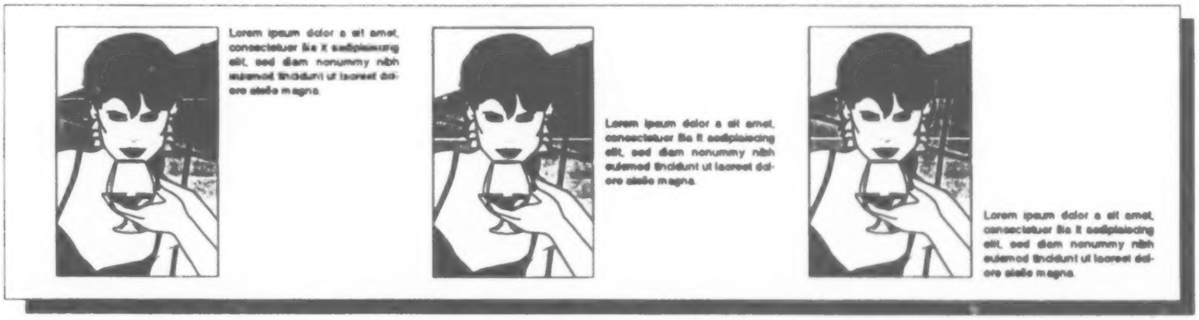
Long captions often look better when both left and right margins are aligned with the edges of the graphic.

Captions can also be placed along the side of the graphic. If the text is not centered between the top and bottom of the graphic, align the caption text with an edge of the picture.



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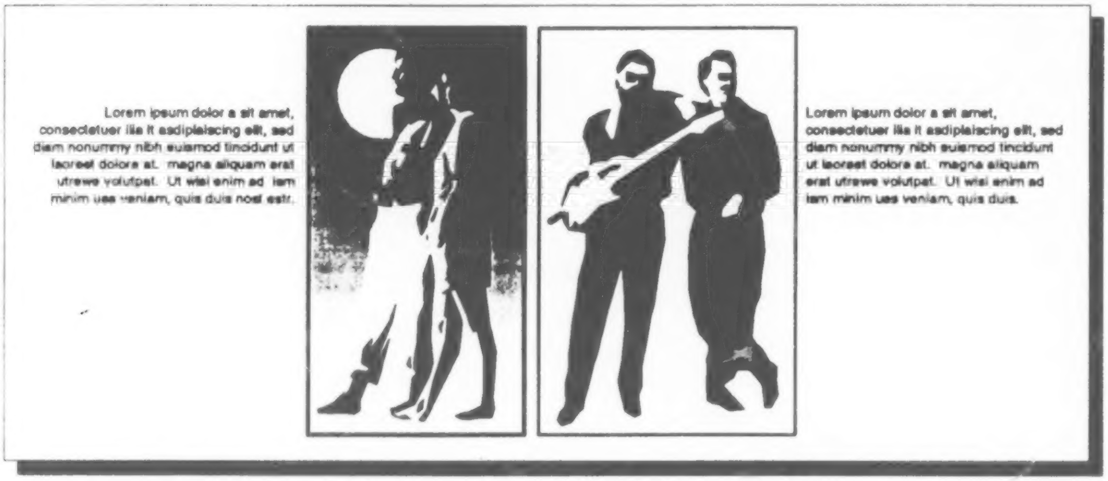
Remember to be consistent once a particular caption placement is chosen.

You can make captions placed on the left or right appear to "stick" to the graphic by giving the side of the caption that faces the graphic a straight edge and letting the other side run ragged. This technique will eliminate the unsightly white space next to the graphic and strengthen the visual tie between the graphic and its caption. However, you must ensure that the resulting text is readable.



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A strong visual link between a graphic and its caption may be necessary, especially if there are two or more graphics on the page.

Body text

Getting your readers to scour the body content of a document is a major goal in publishing. All of the principles of design and page layout and the various page layout techniques you have learned up to this point will help you to create the visual interest needed to draw readers into the body text of a document. However, it is imperative that you remember that once readers begin to read in depth, your goal changes from creating visual interest to creating a rhythmic flow through the text.

Making reading easy

Like most of your tasks in publishing, making body text easy to read involves a compromise. As mentioned above, the goal for your body text is significantly different than the goal for your lead-in items. In many cases these goals are diametrically opposed. There is a trade off between the effects that generate initial interest in a page and reading flow. You must base your level of compromise on an assessment of your audience, their level of interest in the material, and the function of the document. When in doubt, however, don't be afraid to sacrifice some reading flow to create initial visual interest, especially if you are promoting something and/or your audience is resistant to the message you are presenting.

Type for reading

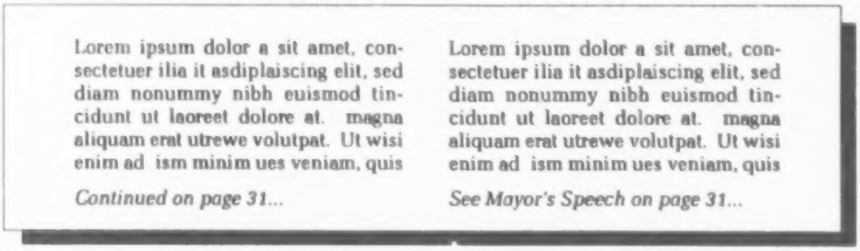
Given that reading flow may be sacrificed for items that draw readers in, it is important that your body text be as easy to read as possible. This section will provide you with some tips for doing just that. Here is a summary of the major attributes that facilitate a rhythmic flow for your readers.

Set the body text in a serif typeface. Never mix two different serif typefaces on the same page. As a general rule, use a single typeface family on a page. The body type should be 10 to 12 points in size. Avoid distractions like excessive italics, underlining, or bold characters. See chapters three and four for a more complete discussion of type.

Direction signs for your readers

Have you ever had trouble finding your way while driving on a new stretch of highway? A critical component of a well designed highway is a comprehensive set of signs that gives drivers clear directions to specific locations. Without them, people get lost! The same thing can happen when readers try to find their way through a publication. It may sound funny, but it is very easy to lose your readers. The path that seemed so straightforward to you when you designed a document may not be so easy for your readers to follow. Like a well designed highway, your pages should include signs that give readers clear directions to specific body content. Here are a few direction signs you should consider for your documents.

Many readers get lost when they turn a page. Therefore, the flow from one page to another must be obvious. If it is not, consider using jump lines that direct the reader to a specific place on another page. Jump lines are critical if your pages contain several articles or if the remainder of an article is not on the next page of the document. "*Continued on page 31...*" may be all that is needed. Often, however, readers will need more specific directions to find the desired text. "*See Mayor's Speech on page 31...*" may be much more effective, especially if page 31 contains several items. Don't forget to place an easily found subhead on page 31 that starts with "Mayor's Speech"!



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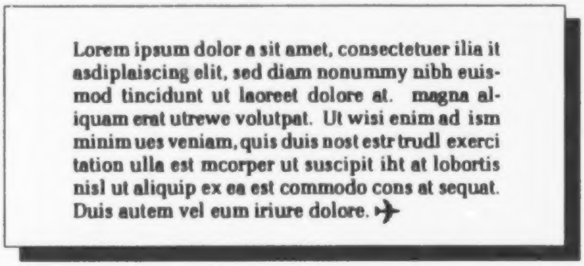
See Mayor's Speech on page 31...

Good jump lines are easily found and clear in their instructions. If the layout is at all complex, jump lines like the one on the right are preferable because they are much more explicit in directing the reader. Notice that these jump lines end with an ellipsis, three dots that indicate a pause in the text. This is fairly standard. Also notice that the type for both jump lines has been set in italics, to make it distinct from the body text.

Another helpful sign for your readers is to make the end of an article obvious. Readers will become annoyed and confused if they continually read into unrelated text after completing an article. This is a problem particularly when the body text is interrupted with graphics, advertising, etc. Use a dingbat or small graphic to indicate the end of your articles. Again, be consistent. Also, be sure not to overpower the body text with a large and distracting symbol at the end of an article.

Assume that this article was in a newsletter concerning aviation. The airplane graphic lets you see immediately where this article ends because the graphic acts as a barrier to eye flow, and the airplane is consistent with the theme of the publication.



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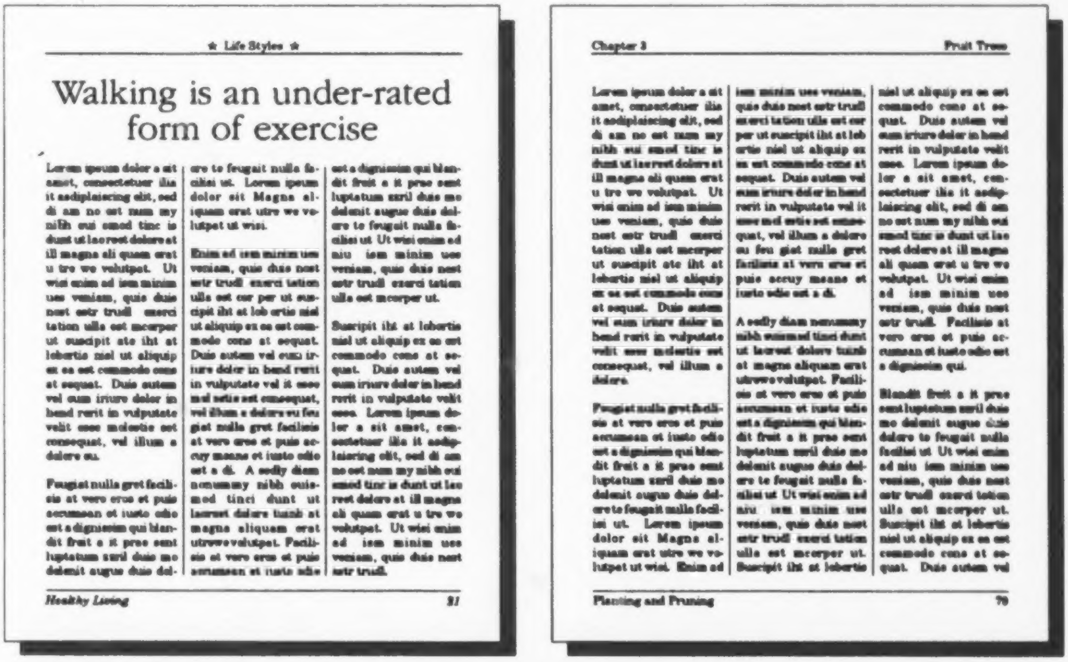
Keep your readers informed with headers and footers. These items provide an easily accessed reference when in depth reading is taking place. In addition to the page number, headers and footers can be used to indicate chapter numbers, chapter titles, section titles, article titles, and article subheads. Often a header or footer contains a phrase that captures the main content of the page. Like so many other techniques in page layout, success is dependent on consistency.



★ Life Styles ★

Walking is an under-rated form of exercise

Healthy Living 31

Chapter 3 Fruit Trees

Planting and Pruning 70

The header and footer become much more important when the page is primarily body text, like the page on the right. They are used to tell readers where they are reading. Also notice that the footer contains reference information so that specific content can be located easily.

BEST COPY AVAILABLE

In longer documents you can use the headers and footers on the even numbered pages for certain information and those on the odd numbered pages for different information. By the way, you should be aware of an important convention regarding page numbering for documents that will be printed on both sides of the paper. It is an industry-wide standard when dealing with facing pages to place even-numbered pages on the left and odd-numbered pages on the right.

Text should have a great looking body

On a well designed page, the body text should look appealing and be easy to read. One way to accomplish this is to break the text into smaller visual units by adding an extra line of white space between each paragraph. This line of white space does not even have to be as wide as a line of type to be effective. The reader will see individual, easily read blocks of text instead of an entire column or page of intimidating text.

The extra white space you add after paragraphs must not be too wide, however, because it will distract your readers. For this reason, you must be conscious of the length of the last line in a paragraph since a very short line will create a double dose of white space. If possible, edit paragraphs so that there are a minimum of five words on the last line. A single word or the last part of a hyphenated word that occupies its own line at the end of a paragraph is known as a widow line. Widow lines must be removed by editing the text.

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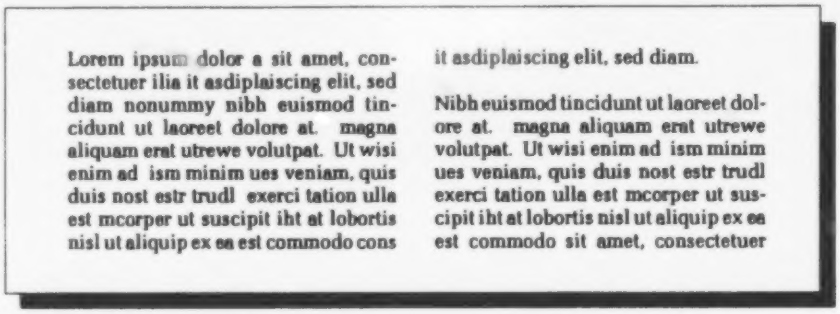
The passage on the left has a widow line which creates unsightly and distracting white space between the paragraphs. The passage on the right has been edited to remove the widow line and the result is much more attractive and more easily read text.

There is another problem with the last line of a paragraph that will require your attention. Sometimes the placement of text in a document results in the last line of a paragraph being forced onto the top of a new column or a new page. This single line is known as an orphan line. If you create an orphan line when placing body text, either edit the text so that the paragraph fits entirely at the bottom of the first page or force a minimum of two to three lines onto the top of the second page.



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The single line of text at the top of the second column is an orphan line. It is unattractive and should be eliminated by editing or by forcing at least 2 to 3 lines onto the top of the new column.

Proofreading

Suppose you are producing a newsletter for a law office. This newsletter will be sent to all of the office's clients. What affect would a spelling mistake have on the image of these lawyers? A simple slip like this and you, as the publisher, could undermine what took years to build. There is only one standard for accuracy that is acceptable in publishing: perfection.

You're aiming at a moving target

Perfection is an illusive goal. There are so many sources of error. If the document contains a lot of body text, you will be amazed at how errors can hide from your sight. You can check your content and swear that it is correct only to distribute the document and have your readers find several mistakes. Here are a few suggestions that will help you eliminate the errors in your documents.

First, don't assume that others will be accurate. If the body text for a document will be typed by someone else, don't place it in a document without thoroughly checking it for mistakes. You can say it wasn't your fault, but if you print a document that contains errors, it's always the publisher's fault!

Second, don't rely too heavily on electronic spelling and grammar checkers to catch all of the problems in your body text. They are, of course, powerful tools, but they won't find all of the mistakes. Typographical errors that result in properly spelled words is one example. If the word "man" is typed incorrectly as "men," a spell checker won't flag the error.

Furthermore, spell checkers will not find problems with hyphenated words because they ignore the hyphen and simply check the spelling of the whole word. Certain hyphenations, however, can have horrendous results. For example, assume you are producing a newsletter targeted for abused women. You are placing the text of an article concerning a young woman who sought professional help for her problem. What do you think the response might be if the page layout program you were using hyphenated the word "therapist" as "the-rapist." It can happen. The most effective tool you have for finding these kinds of errors in body text is a keen pair of eyes that proofreads every single word in a document.

Third, read your body text word by word backwards from the end of an article to the beginning. If you have ever done much proofreading, you will appreciate the difficulty of the task. It is very hard to find all of the errors. One of the problems is that your eyes do not focus on individual characters when you read. Instead, your mind takes in whole words and phrases at a time. This is why you can read a misspelled word and not notice the minor error in spelling. The only effective way to make your mind focus on the spelling of individual words is to force yourself *not* to read. Proofreading backwards does just that.

Copyfitting

In an ideal world, all of the articles you have to place in a magazine, newsletter, or similar document would fit perfectly in the available space or you would have the luxury of adding pages to the document until all of the articles fit. In reality, you are subject to a major law in publishing: the law of bad luck. This law is a derivative of Murphy's law, and it states that there will be no possible way to fit all of the articles for a given document in the space available, *and* you are prevented from adding pages due to budgetary constraints. This means that you are forced into creating article limits for authors and reducing the amount of text if those limits are exceeded. This process of making articles fit is called copyfitting.

There are many methods for fitting body text into available space. Several procedures are complex and yield very accurate calculations. While these may be useful for professional printers, they are beyond the needs of the average desktop publisher. Here, you will learn some very simple but practical techniques for copyfitting calculations. The method you use to make your body text fit depends on whether you are dealing with the text before or after it is written.

Dealing with the text before it is written

If you are laying out a document before the articles have been written, you can determine exactly how much space an author has for a particular article. There are two easy ways to convey this limit to the author. Both methods are based on a technique known as Greeking-in the text. This simply means that paragraphs of nonsense words have been used to fill in for the real words that will come later. This technique allows you to see how finished pages will look as well as determine the length of individual articles. A file of Latin words has been used to Greek-in the text for many examples in this book.

The first method is to give your authors a measurement of article length in column-inches (column-centimeters if you are using metric measurement). The steps are as follows:

1. Determine the layout grid including margins and alleys.
2. Determine the type specifications including the typeface, the size, and the leading for the body text.
3. Create a dummy layout. Include dummies for headlines, lead-ins, subheads, graphics, and Greeked-in text.
4. Measure the length of each column or partial column of text for an article. Add up the measurements for the total number of column-inches used for the article.
5. Tell authors to set up their word processors with the same type specifications and column width as those used in the dummy layout you have already created.
6. Direct authors to write articles that extend to the total number of column-inches allocated for their article; no more, no less.

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This file is used to Greek-in the text for an article before it is written. The embedded numbers will also give you an accurate estimate of the word count for the article. This limit can be given to the author so that copyfitting is less of a headache.

If it is impossible for the author to use a word processor or to set up with the exact type specifications, it will be simpler to specify the article limit as the total number of words that can be written. One of the easiest ways to determine word length is with a file of Greek text that has word count numbers typed right into the file. When this file is placed on the dummy layout, the last line of the text tells you the number of words that will fit. Follow steps 1 to 3 above, then place the numbered file onto the layout to determine article length.

Dealing with the text after it is written

If you must place text that has already been written before you get a chance to dummy out a layout, then your task may be a little more difficult. To get a feel for the amount of text you are dealing with, follow steps 1 and 2 above, then place all of the articles onto the layout one right after the other. This will tell you how many pages will be required. If the number of pages for the document is flexible, you need only concern yourself with placing headlines, lead-ins, subheads, and graphics.

However, if the number of pages for the document is fixed, your task becomes much more difficult. Placing the articles in the layout as described above will tell you how much text must be removed to make it fit in the available space. If the total amount exceeds the number of pages, then obviously you must remove text to make it fit. You must also reduce the amount of text if the total amount is close to the total number of pages because there will not be enough room for the other items that must be placed in the document.

Determining how much text must be removed is the easy part of fitting text into a document of fixed length. The hard part is determining what to remove. If possible, ask the authors of your articles to do the editing. They know the content better than anyone and should be in the best position to remove text without compromising the main thrust of the article. Time constraints and other practical considerations may make this kind of interaction with the authors impossible. In that case, you must edit the text yourself. Editing is an art, and it is far beyond the scope of this book to teach the skills necessary to become a good editor. Taking some workshops on editing or at least reading some books on the topic are highly recommended for publishers. You may also want to consult a trained editor. A good editor is worth their weight in gold and their services may save you a lot of time and frustration. Regardless of how an article is reduced, remember not to be too cavalier when editing the prose of another.

Summary

There are a great many tricks of the page layout trade, far more than were covered in this chapter. The material presented here was meant only as an introduction to some standard techniques for the major components of page layout. These will help you with some of the common problems you will face as a publisher. Each technique that was outlined here can be studied in greater depth. But that doesn't mean you can't begin producing useful, attractive, even sophisticated documents right now. If you apply the content of this last chapter to your work, you will be quite capable of sophisticated work by the time you are ready to move on to more advanced books.

The key to success is to focus on the principles of design, typography, and page layout. Techniques are of secondary importance: add them to your work only as you feel ready. Be realistic and don't rush yourself. Your feel for design and your own personal style will develop naturally as you go. Good luck and remember to enjoy yourself along the way!

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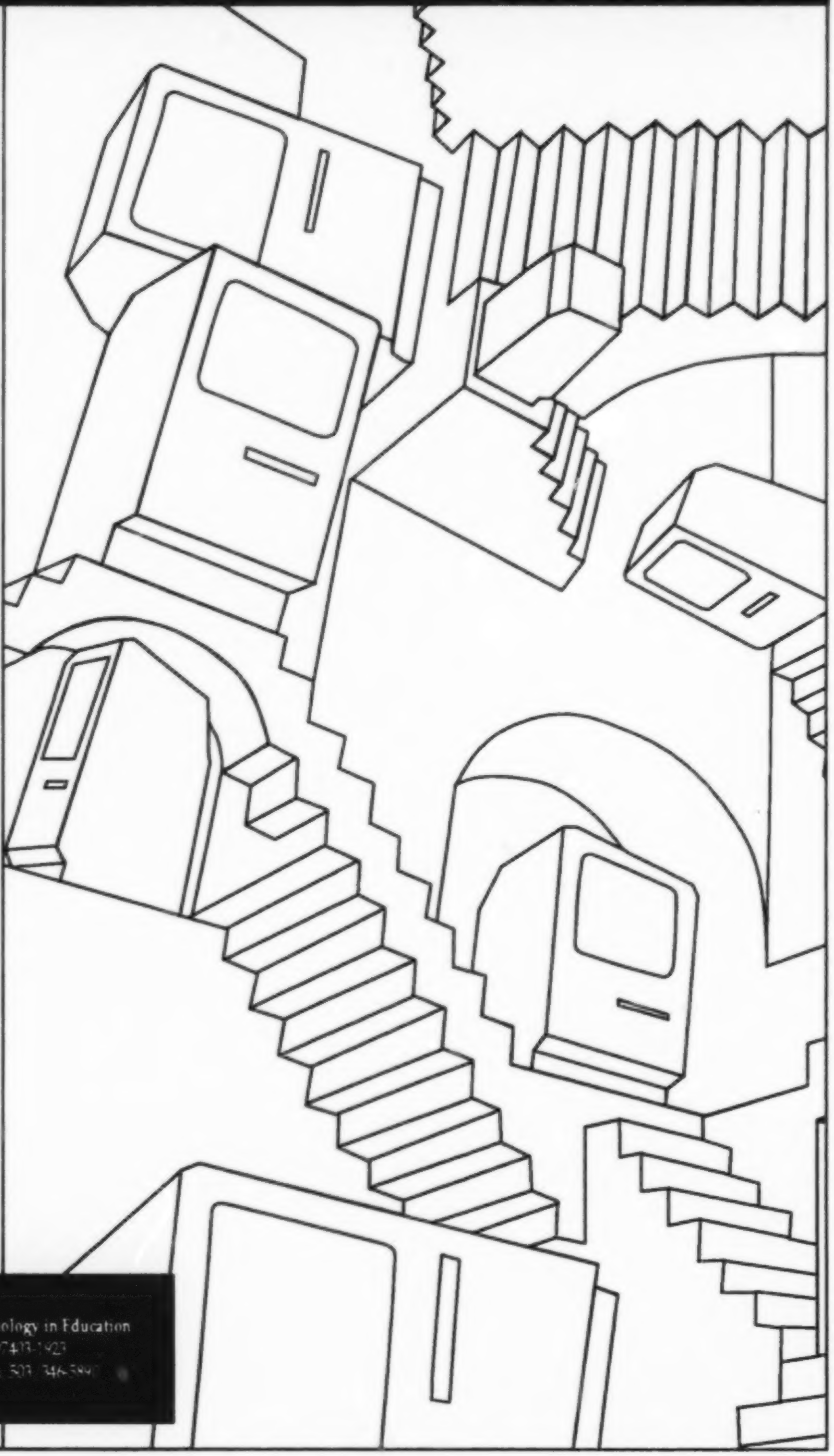

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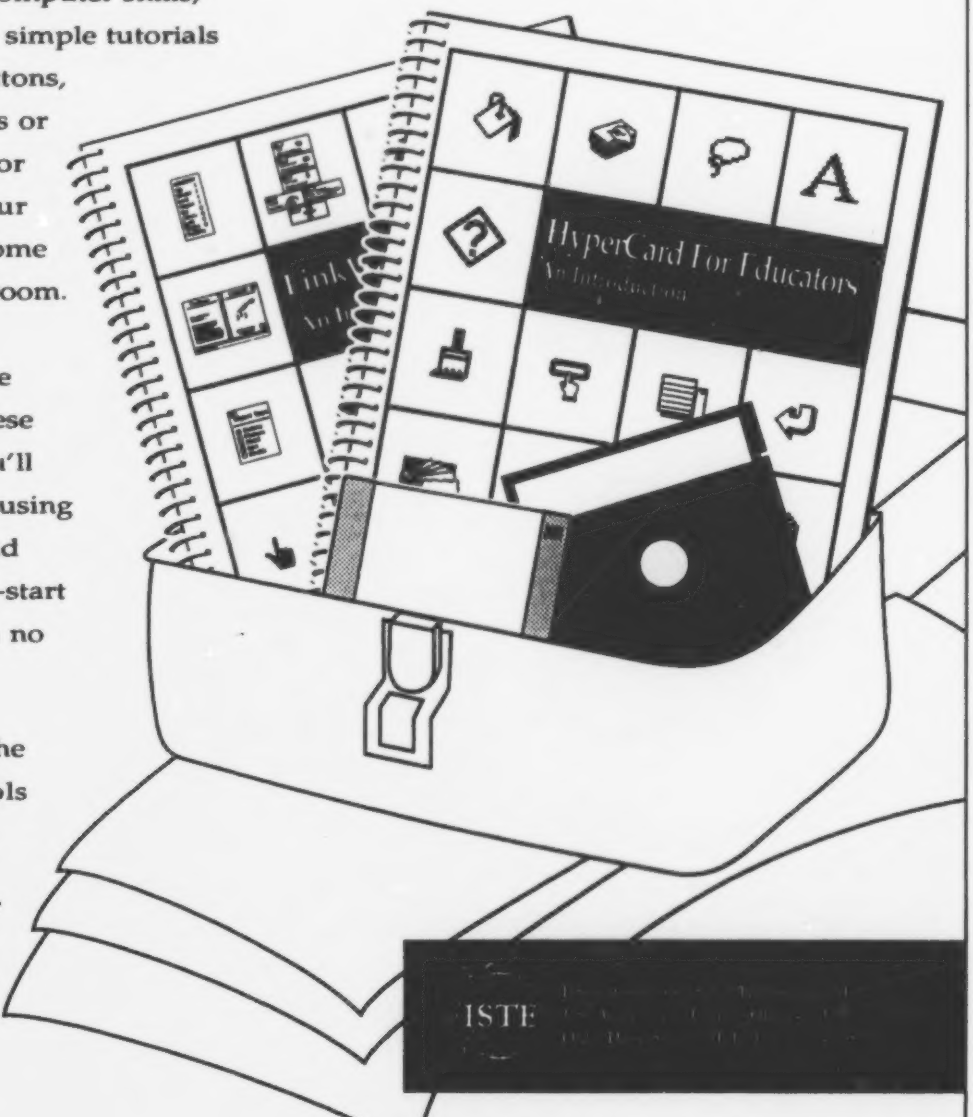

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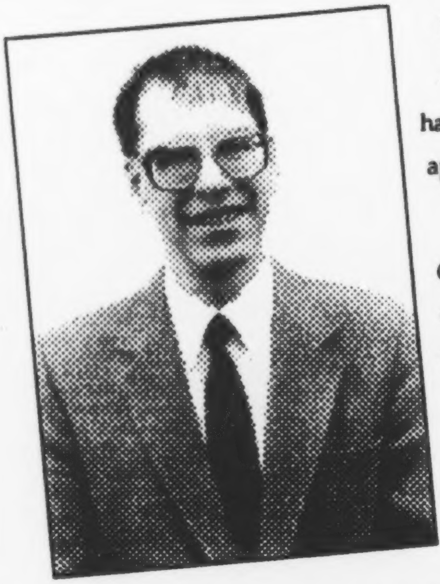

ISTE Executive Officer Dave Moursund is dedicated to improving education.

Since he first began working with computers in education in 1963, Dave has constantly sought to improve education at all levels through the use of appropriate computer-related technology.

As a continuing part of this effort, Dave's newest book—*The Technology Coordinator*—discusses the goals of education and how teachers and teachers of teachers can join in the enormous change process facing today's schools.

This book was written for educators who want to play a leadership role in the instructional use of technology. Dave uses interviews with technology coordinators to illustrate the needs, roles, and qualifications needed to accomplish the goals of educational technology.

In recent years, Dave has focused much of his writing efforts on problem solving and on staff development. Some of Dave's other books also available from ISTE include *Problem-Solving Models for Computer Literacy, LogoWriter for Educators: A Problem Solving Approach, Logo PLUS for Educators: A Problem Solving Approach* (co-authored with Sharon Yoder), and *Effective Inservice for Integrating Computer-as-Tool into the Curriculum.*

"Our educational system is not nearly as good as it could be," says Dave. "We know that computer-related technology can make substantial contributions to improving both the content of the curriculum and the instructional delivery system. Such technology can empower students and teachers.'

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ISTE's wide range of periodicals, publications, projects, and other activities mirror this vision and commitment.

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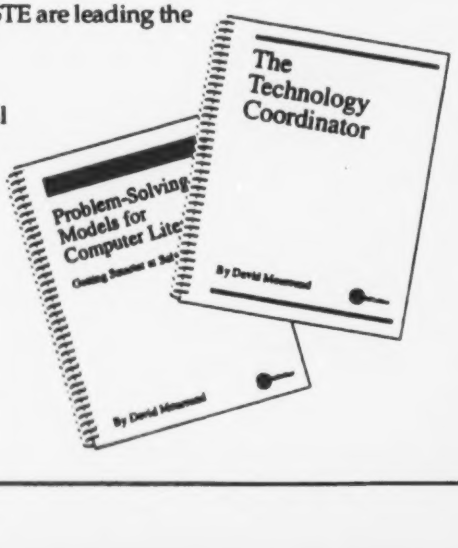

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